

# Document Pack



Mark James LLM, DPA, DCA  
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**MONDAY, 11 DECEMBER 2017**

**TO: ALL MEMBERS OF THE EXECUTIVE BOARD**

I HEREBY SUMMON YOU TO ATTEND A MEETING OF THE **EXECUTIVE BOARD** WHICH WILL BE HELD IN THE **CHAMBER, COUNTY HALL, CARMARTHEN AT 10.00 AM, ON MONDAY, 18<sup>TH</sup> DECEMBER, 2017** FOR THE TRANSACTION OF THE BUSINESS OUTLINED ON THE ATTACHED AGENDA

*Mark James* CBE

**CHIEF EXECUTIVE**



PLEASE RECYCLE

<b>Democratic Officer:</b>	<b>Janine Owen</b>
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<b>Ref:</b>	<b>AD016-001</b>

# EXECUTIVE BOARD

## MEMBERSHIP - 10 MEMBERS

<b>Councillor</b>	<b>Portfolio</b>
<b>Councillor Emlyn Dole</b>	<b>Leader</b> Corporate Leadership and Strategy; Chair of Executive Board; Represents Council at WLGA; Economic Development Represents the Council on the Swansea Bay City Region; Collaboration; Marketing and Media; Appoints Executive Board Members; Determines EBM Portfolios; Liaises with Chief Executive; Public Service Board
<b>Councillor Mair Stephens</b>	<b>Deputy Leader</b> Council Business Manager; Human Resources; Performance Management; Wales Audit; Training; I.C.T.; T.I.C. (Transformation, Innovation and Change); Strategic Planning
<b>Councillor Cefin Campbell</b>	<b>Communities and Rural Affairs</b> Rural Affairs and Community Engagement; Community Safety; Police; Counter-Terrorism and Security Act 2015; Tackling Poverty; Wellbeing of Future Generations; Third Sector Liaison
<b>Councillor Glynog Davies</b>	<b>Education and Children</b> Schools; Children's Services; Special Education Needs; Safeguarding; Respite Homes; Regional Integrated School; Improvement Service; Adult Community Learning; Youth Services; School Catering Services, Lead Member for Children and Young People; Youth Ambassador
<b>Councillor Hazel Evans</b>	<b>Environment</b> Refuse; Street Cleansing; Highways and Transport Services; Grounds Maintenance; Building Services; Caretaking; Building Cleaning; Emergency Planning; Flooding
<b>Councillor Linda Evans</b>	<b>Housing</b> Housing – Public; Housing – Private, Equalities; Ageing Well
<b>Councillor Peter Hughes Griffiths</b>	<b>Culture, Sport and Tourism</b> Town and Community Councils Ambassador; Development of the Welsh Language; Theatres; Sports; Leisure Centres; Museums; Libraries; Country Parks; Tourism.
<b>Councillor Philip Hughes</b>	<b>Public Protection</b> Trading Standards; Environmental Health. Environmental Enforcement; Planning enforcement; Unlicensed Waste; Parking Services; Bio diversity
<b>Councillor David Jenkins</b>	<b>Resources</b> Finance & Budget; Corporate Efficiencies; Property/Asset Management; Procurement; Housing Benefits; Revenues; Statutory Services (Coroners, Registrars, Electoral, Lord Lieutenancy); Armed Forces Champion Contact Centres and Customer Service Centres
<b>Councillor Jane Tremlett</b>	<b>Social Care &amp; Health</b> Adult Social Services; Residential Care; Home Care; Learning Disabilities; Mental Health; NHS Liaison/Collaboration/ Integration; Care Home Catering Services, Carers' Champion; Dementia Care Champion; Disability Ambassador

# AGENDA

1. APOLOGIES FOR ABSENCE.
2. DECLARATIONS OF PERSONAL INTEREST.
3. TO SIGN AS A CORRECT RECORD THE MINUTES OF THE MEETING OF THE EXECUTIVE BOARD HELD ON THE 27<sup>TH</sup> NOVEMBER 2017 5 - 12
4. QUESTIONS ON NOTICE BY MEMBERS
  - 4.1 QUESTION BY COUNCILLOR EDWARD THOMAS TO COUNCILLOR EMLYN DOLE, LEADER OF THE COUNCIL

The Banks, in particular the recent announcement to close branches in Llandeilo and Ammanford are effecting the social fabric wellbeing of these communities and disadvantaging the Small Medium Enterprises that operate in our rural communities. What can you suggest we do to get them to reverse the decision and also prevent further bank closures?
5. PUBLIC QUESTIONS ON NOTICE
6. STRATEGIC EQUALITY PLAN ANNUAL REPORT 2016-17 13 - 52
7. ANNUAL REPORT 2016/17 ON THE WELSH LANGUAGE 53 - 138
8. LOCAL DEVELOPMENT PLAN REVIEW 139 - 266
9. LOCAL DEVELOPMENT PLAN DELIVERY AGREEMENT & SITE ASSESSMENT METHODOLOGY 267 - 332
10. COUNCIL TAX BASE 2018-19 333 - 366
11. MODERNISING EDUCATION PROGRAMME (MEP) STRATEGIC OUTLINE PROGRAMME (SOP) - BAND B UPDATE 367 - 404
12. MODEL TEACHERS' PAY POLICY 2017/18 405 - 448
13. MODEL UNATTACHED TEACHERS PAY POLICY 2017/18 449 - 488
14. FIVE YEAR CAPITAL PROGRAMME 2018/19 - 2022/23 489 - 504
15. ANY OTHER ITEMS OF BUSINESS THAT BY REASONS OF SPECIAL CIRCUMSTANCES THE CHAIR DECIDES SHOULD BE CONSIDERED AS A MATTER OF URGENCY PURSUANT TO SECTION 100B(4)(B) OF THE LOCAL GOVERNMENT ACT, 1972.

## **16. EXCLUSION OF THE PUBLIC**

THE REPORTS RELATING TO THE FOLLOWING ITEMS ARE NOT FOR PUBLICATION AS THEY CONTAIN EXEMPT INFORMATION AS DEFINED IN PARAGRAPH 14 OF PART 4 OF SCHEDULE 12A TO THE LOCAL GOVERNMENT ACT 1972 AS AMENDED BY THE LOCAL GOVERNMENT (ACCESS TO INFORMATION) (VARIATION) (WALES) ORDER 2007. IF, FOLLOWING THE APPLICATION OF THE PUBLIC INTEREST TEST, THE BOARD RESOLVES PURSUANT TO THE ACT TO CONSIDER THESE ITEMS IN PRIVATE, THE PUBLIC WILL BE EXCLUDED FROM THE MEETING DURING SUCH CONSIDERATION.

- |  |           |
|--|-----------|
| <b>17. BURRY PORT HARBOUR</b>                        | 505 - 564 |
| <b>18. GUILDHALL, CARMARTHEN</b>                     | 565 - 570 |
| <b>19. PURCHASE OF LAND AT NANTGLAS, CROSS HANDS</b> | 571 - 578 |



## EXECUTIVE BOARD

Monday, 27 November 2017

**PRESENT:** Councillor L.M. Stephens (Chair)

**Councillors:**

H.A.L. Evans, L.D. Evans, D.M. Jenkins, J. Tremlett, P.M. Hughes, P. Hughes-Griffiths, G. Davies and C.A. Campbell

**Present as Observers:**

**Councillors** S. Davies, J. Edmunds, J. James, R. James. B.A.L. Roberts and J. Prosser

**The following Officers were in attendance:**

M. James, Chief Executive  
 J. Morgan, Director of Community Services  
 C. Moore, Director of Corporate Services  
 G. Morgans, Director of Education & Children's Services  
 R. Mullen, Director of Environment  
 W. Walters, Director of Regeneration & Policy  
 P.R. Thomas, Assistant Chief Executive (People Management & Performance)  
 L.R. Jones, Head of Administration and Law  
 R. Staines, Head of Housing and Public Protection  
 D. Hockenhull, Marketing and Media Manager  
 K. Thomas, Democratic Services Officer

**Chamber, County Hall, Carmarthen - 10.00 - 10.50 am**

**1. APOLOGIES FOR ABSENCE.**

An apology for absence was received from Councillor E. Dole

**2. DECLARATIONS OF PERSONAL INTEREST.**

Councillor	Minute Number	Nature of Interest
H.A.L. Evans	6 – The Establishment of a Council Owned Housing Company	Sister is the Chief Executive of the Bro Myrddin Housing Association
H.A.L. Evans	7 – Introduction of 'choice Based Lettings Process' for Council Housing in Carmarthenshire	Sister is the Chief Executive of the Bro Myrddin Housing Association
Mr J. Morgan, Mrs R. Mullen, Mr C. Moore, Mrs W. Walters, Mr G. Morgan, Ms. L. Rees Jones, P.R. Thomas, Ms D. Hockenhull and K. Thomas	13 – Severance Scheme – Extension beyond March 2018	The scheme relates to the Authority's staff

**3. TO SIGN AS A CORRECT RECORD THE MINUTES OF THE MEETING OF THE EXECUTIVE BOARD HELD ON THE 23RD OCTOBER 2017**

**UNANIMOUSLY RESOLVED** that the minutes of the meeting of the Executive Board held on the 23<sup>rd</sup> October, 2017 be signed as a correct record.

**4. QUESTIONS ON NOTICE BY MEMBERS**

The Chair advised that no questions on notice had been submitted by members.

**5. PUBLIC QUESTIONS ON NOTICE**

The Chair advised that no public questions on Notice had been received.

**6. THE ESTABLISHMENT OF A COUNCIL OWNED HOUSING COMPANY**

(NOTE: Councillor H.A.L. Evans, having earlier declared an interest in this item, left the Council Chamber, during its determination by the Executive Board)

The Executive Board, (further to minute 13 of its meeting held on the 27<sup>th</sup> February, 2017) considered a report on proposals for the establishment of a Council Owned Local Housing Company (The Company) as a development vehicle to accelerate house building within Carmarthenshire to increase the supply of much needed additional homes, whilst creating jobs, training and apprenticeship opportunities, supporting the supply chain and delivering the Council's regeneration ambitions. The Company would also compliment the continuing use of the Housing Revenue Account resources to commission new homes (where it was appropriate to do so) and would also support the Council's Affordable Housing Commitment of March 2016 for alternative housing delivery options to increase the number of homes within the County.

The Executive Board was advised, that if endorsed, the Company would be wholly owned by the Council, would not involve the transfer of any of the Council's existing housing stock, which would continue to be managed and maintained by the Council, or the TUPE (Transfer of Undertakings Protection of Employees) of existing staff.

The Executive Board was further advised that the report set out in detail the arrangements for establishing the Company and contained seven recommendations for its approval which included the arrangements for the appointment of five company directors, the preparation of a business plan for the approval of both the Board and the Council and the initial set up costs.

The report had been considered and endorsed by the Community Scrutiny Committee, at its meeting held on the 24<sup>th</sup> November, 2017 with the added recommendation that the Executive Board give consideration to a suggestion that the Council receive a presentation on the completed Business Plan at the appropriate time.

Councillor John Prosser, in accordance with Corporate Procedure Rule 11.1 asked whether the proposed Council Housing Company, which was going to have five Directors, with only one council member being a director, would mirror the position

in England and other Housing Companies and would it not be better, for scrutiny, if the Council adopted the same position as with its Pensions Committee and appointed three Council members as Directors on a cross party basis to be more representative, regardless of who was in power.

The Executive Board Member for Housing advised that as with all companies, the Board of Directors would be responsible for running the Company and have responsibilities to comply with company law. If the Board of Directors comprised a majority of council members, it could be seen as, and accused of being, a body governed by public law. In other words, it would look like local government and therefore would have to follow the rules of local government, including procurement obligations. It was important the aim of the Company was understood and the Directors had the necessary skills and vision to ensure its success. The Council would be the only shareholder, and the Board of Directors would be accountable to the Executive Board which could appoint and remove Directors as required.

In response to a supplementary question from Councillor Prosser, the Executive Board Member for Housing confirmed the Executive Board would be responsible for appointing the company directors and ensuring those appointed had the right skills, knowledge and expertise required to operate the company.

#### **UNANIMOUSLY RESOLVED**

- 6.1 That a wholly owned Housing Company 'The Company' be created to build homes for sale and rent and act as a catalyst for further regeneration activities.**
- 6.2 That the Company be incorporated as a limited company with the Council as the sole shareholder.**
- 6.3 That the Articles of Association and Shareholder consent for the Company be approved.**
- 6.4 That the Company's Business Plan be prepared and agreed by the Board of the Company and submitted for formal approval by the Executive Board of the Authority prior to its implementation.**
- 6.5 That any loan from the Council, as agreed in the Company's business plan, be repaid at a commercial rate of interest, as agreed by the Director of Corporate Services.**
- 6.6 That the set up costs of the Company (estimated to be £100,000 in 2017/18) be recovered by way of a loan arrangement (at a commercial rate set by the Director of Corporate Services) with the duration to be agreed within the detailed business plan. In the event the Company was not established, the implementation costs be met from reserves.**
- 6.7 That the Board of Directors comprise one member of the Council, two officers and two external appointments.**

#### **7. INTRODUCTION OF A 'CHOICE BASED LETTINGS' PROCESS FOR COUNCIL HOUSING IN CARMARTHENSHIRE**

(Councillor H.A.L. Evans, having earlier declared an interest in this item, remained in the meeting and took part in its consideration and voting thereon)

The Executive Board considered a report on proposals for the introduction of a 'Choice Based Lettings' process for Council Housing in Carmarthenshire whereby

the Council would openly advertising vacant properties and invite people on the Housing Choice Register to bid for the tenancy of those properties, as opposed to the current policy of offering properties to prospective tenants . The new process, if adopted, was considered to be beneficial to both tenants and the Council in that it:

- Was open and transparent in relation to vacancies;
- Ensured applicants who expressed an interest in a particular property wanted the home rather than accepted it on the basis there was a penalty if they refused,
- Was more likely the successful applicant would accept the property and stay longer (making for more sustainable tenancies and communities)
- Provided the authority with real time planning data regarding the popularity/desirability of its homes, which should influence the asset management strategy and affordable homes commitment,
- Reduced staff time spent identifying applicants,
- Reduced property refusals
- Complemented the Council's 'do it on-line' programme.

The Executive Board was informed that the Community Scrutiny Committee, at its meeting held on the 24<sup>th</sup> November, 2017 had been consulted on, and endorsed, the proposal for adoption by the Executive Board.

**UNANIMOUSLY RESOLVED that the Council's existing process for the letting of homes be changed in favour of a 'Choice Based Lettings' approach.**

## **8. COUNCIL'S REVENUE BUDGET MONITORING REPORT**

The Executive Board considered the revenue budget monitoring report which provided an update on the latest budgetary position as at the 31<sup>st</sup> August, 2017.

Overall, the report forecast an end of year overspend of £1,706k on the Authority's net revenue budget, with an over-spend at departmental level of £2,829k. The Housing Revenue account was forecasting an under-spend of £21k.

### **UNANIMOUSLY RESOLVED:**

- 8.1. that the budget monitoring report be received.**
- 8.2 that Chief Officers and Heads of Service critically review their budgetary positions and implement appropriate actions to deliver their services within their allocated budgets.**

## **9. CAPITAL PROGRAMME 2017-18 UPDATE**

The Executive Board considered a report providing an update on the capital programme spend against the budget for 2017/18 as at the 31<sup>st</sup> August, 2017 together with the re-profiled five year capital programme for the period 2017/18 – 2021/22.

The Executive Board noted that, based upon the projected £80.788m budget, there was a variance of £30.427m attributable to slippage of projects between financial years which, would be slipped into future years as the funding would be required to ensure the schemes' completion over a longer timescale.

## **UNANIMOUSLY RESOLVED**

- 9.1 that the capital programme update budget monitoring report, as detailed in Appendix A and B, be received.**
- 9.2 That the re-profiled five year capital programme 2017/18 – 2021/22, as detailed in Appendix C to the report be received.**

## **10. REVENUE BUDGET STRATEGY 2018/19 to 2020/21**

The Executive Board considered the above report which provided an overview of the Revenue Budget for 2018/19 and the following two years. The report detailed the budget process timetable, summarised the Welsh Government's provisional settlement, the final settlement timetable and identified the validation and budget pressures that needed to be considered by members in setting next year's revenue budget. The report also formed the basis of the budget consultation process that would be undertaken with the Council's scrutiny committees and the community during the period November, 2017 – January, 2018 prior to a report being submitted to the Executive Board and thence to Council.

The report outlined the key elements of the draft budget strategy and highlighted that Carmarthenshire's provisional cash settlement, whilst better than originally anticipated, represented a 0.5% reduction in grant funding, which was significantly enhanced when the Authority took into account inflationary factors, demographics and demand changes. However, the better than anticipated provisional settlement had enabled the Authority to revisit its efficiency targets, set in the original budget outlook report presented to the Executive Board in July 2017, and confirm the Strategy proposed no reduction in the schools' delegated budget.

It was noted that the provisional settlement included the 'transfer in' of a number of major grants including the Single Environment Grant, at £35m across Wales, Independent Living Grant of £26.9m and Social Care Workforce Grant of £19m to support the Local Government Principle of providing more control to authorities to manage their services and assist in reducing the level of work in administering specific grants locally. It was further noted that only one new responsibility had been included in the settlement with an additional £6m to support the delivery of local services to meet Homelessness Prevention Duties.

The Budget Strategy contained £7.7m for essential validation together with an additional £3m for new expenditure, as identified by departments in Appendix B to the report. Departments had again identified efficiency savings, as detailed in Appendix A to the report, of £8.3m in year 1 and a further £17.2m over the following two years ensuring the authority, based on current projections could deliver essential services whilst endeavouring to contain any council tax increase to an acceptable level. The report also provided an overview of current reserves, which were to be further reviewed, with the anticipation of any reserves becoming available being used to support the capital programme and the delivery of regeneration opportunities, therefore sustaining future growth within the County.

The current budget proposals, having regard to the above factors had enabled the proposed council tax increase for 2018/19 to be contained to 4.12%.

Reference was made to page 134 of the report and to the Welsh Government Statement that 'the school element of the settlement had been increased by £62m

in 2018-19'. The Board was informed that the figure did not represent 'new money' but was merely a diversion of funding from other services. The Chief Executive confirmed that whilst that money had been incorporated within the settlement, it did not detract from the fact the Authority's 2018/19 settlement would still be 0.5% less than 2017/18.

**UNANIMOUSLY RESOLVED** that the contents of the report be noted and the three year budget strategy be approved as a basis for consultation, and to specifically seek comments from consultees on the efficiency proposals detailed in Appendix A to the report.

## **11. NATIONAL BOTANIC GARDEN OF WALES**

The Executive Board considered a request received from the National Botanic Garden of Wales for the Authority to provide an extension on its current loan and lease agreements due to expire on the 31<sup>st</sup> March, 2018 on the basis it was not currently in a position to repay the outstanding loan amount of £1.35m and to also enable it to raise additional funds to undertake renovation works to the three leased farmhouses. The Gardens, as part of the request, had submitted to the Authority its five year business plan detailing how it proposed to improve its financial sustainability by undertaking a range of project and business development activities, a number of which had already been implemented to positive effect.

The Executive Board, in considering the report, had regard to the fact the Gardens had benefitted from an interest free loan from the Council since 2005, currently valued at £1.35m, and that if the request were to be supported, it would expect repayment of the loan at the end of the extension.

Reference was also made to the support provided by the Council over previous years and a suggestion made it may be beneficial for the Executive Board to visit the Gardens.

### **UNANIMOUSLY RESOLVED:**

- 11.1 That the Authority's interest free loan to the National Botanic Garden of Wales be extended for a further two years to the 31<sup>st</sup> March 2020.**
- 11.2 That the National Botanic Garden of Wales be allowed continued occupation of three of the four farmhouses on a tenancy basis for a further two years to the 31<sup>st</sup> March 2020.**
- 11.3 That the National Botanic Garden of Wales be informed that the Council expected interest to be charged on the loan from April 1st 2020.**
- 11.4 That the Executive Board undertake a visit to the National Botanic Garden of Wales.**

## **12. TREASURY MANAGEMENT AND PRUDENTIAL INDICATOR REPORT 1ST APRIL 2017 TO 30TH SEPTEMBER 2017**

The Executive Board, in accordance with the 2017/18 Treasury Management Policy and Strategy (adopted by Council on the 6<sup>th</sup> February, 2017 – Minute 9 Refers) received an update on the treasury management activities for the period 1<sup>st</sup> April, 2017 to the 30<sup>th</sup> September, 2017.



**UNANIMOUSLY RESOLVED THAT IT BE RECOMMENDED TO COUNCIL THAT the report be received.**

**13. SEVERANCE SCHEME - EXTENSION BEYOND MARCH 2018**

(NOTE: All Officers in attendance at the meeting declared an interest in this item and left the meeting during its consideration, with the exception of the Chief Executive and the Democratic Services Officer)

The Executive Board considered a report on the operation of the Council's Severance Scheme which, having been in place since 2016, had enabled the Authority to release 38 employees from its employment out of a total of 336 applications received. It was reported that whilst the scheme had provided managers with a method of incentivising staff to volunteer to leave their employment, thereby making it easier to manage change and reduce the requirement for enforced redundancies, the numbers of employees being released over time had reduced to the point where it was considered opportune to review the scheme in relation to:-

- a) Whether the policy and process should continue in its current format;
- b) Whether the policy should be withdrawn;
- c) Whether the policy should be continued, but with a more flexible and lower key approach.

The Executive Board gave due regard to the each of the three options, and to the explanations for each detailed within the report.

**UNANIMOUSLY RESOLVED that Option C be adopted, and rather than continue with a formal process of inviting severance applications from staff annually, the policy be retained and extended for a further three years or beyond and be utilised by managers alongside other strategies, as required.**

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**CHAIR**

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**DATE**

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## EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

### STRATEGIC EQUALITY PLAN ANNUAL REPORT 2016-17

**Purpose:**

To endorse the Strategic Equality Plan Annual Report for 2016-17

**Recommendations / key decisions required:**

That the Executive Board approves the Strategic Equality Plan Annual Report for 2016-17

**Reasons:**

The Equality Act 2010 brings together and replaces the previous legislation and simplifies and strengthens the law, making it easier for people to understand and comply with. The majority of the Act came into force on 1 October 2010.

Annual reporting is one of the prime opportunities for review, monitoring and reflection and for an authority to capture its ongoing activity around meeting the general and specific duties. This includes any reflection on whether its arrangements and actions are effective and remain appropriate. Annual reports will assist authorities in monitoring their own work, as well as providing transparency for stakeholders.

Annual reports must include the specified employment information, including information on training and pay. The Workforce Information Report is prepared by the People Management division.

**Relevant scrutiny committee consulted:**

YES (Policy & Resources Scrutiny Committee – 06.12.17)

Exec Board Decision Required	YES
Council Decision Required	NO

**EXECUTIVE BOARD MEMBER PORTFOLIO HOLDER:-** Cllr. Linda Evans

Directorate	Regeneration & Policy	Tel Nos / E Mail Addresses:
Name of Head of Service:	Designations:	01267 224112
Wendy Walters	Director	<a href="mailto:WSWalters@carmarthenshire.gov.uk">WSWalters@carmarthenshire.gov.uk</a>
Report Author:		01267 22914
Llinos Evans	Policy & Partnership Officer	<a href="mailto:LlinEvans@carmarthenshire.gov.uk">LlinEvans@carmarthenshire.gov.uk</a>

# EXECUTIVE SUMMARY

## 18<sup>TH</sup> DECEMBER 2017

### STRATEGIC EQUALITY PLAN ANNUAL REPORT 2016-17

#### 1. BRIEF SUMMARY OF PURPOSE OF REPORT.

The Equality Act 2010 includes a new public sector equality duty, replacing the separate duties on race, disability and gender equality.

The new general duty covers the following protected characteristics:

- Age
- Gender reassignment
- Sex
- Race – including ethnic or national origin, colour or nationality
- Religion and belief – including lack of belief
- Disability
- Marriage and Civil Partnership
- Pregnancy and maternity
- Sexual Orientation

The aim of the general duty is to ensure that public authorities and those carrying out a public function consider how they can positively contribute to a fairer society through advancing equality and good relations in their day-to-day activities.

Public bodies are required to have due regard to:

- Eliminate unlawful discrimination, harassment and victimisation and other conduct that is prohibited by the Act
- Advance equality of opportunity between people who share a relevant protected characteristic and those who do not
- Foster good relations between people who share a protected characteristic and those who not.

#### 2. OTHER OPTIONS AVAILABLE AND THEIR PROS AND CONS

The Wales specific equality duties set out the requirement to report annually under the heading *Reports by authorities on compliance with the general duty*. This is a useful reminder that the essential purpose of the specific duties is to help authorities to have better due regard to the need to achieve the 3 aims of the General Duty. The Regulations invite authorities to produce an annual report covering *any matter* that is relevant to the authority fulfilling the general and specific equality duties.

DETAILED REPORT ATTACHED?

YES

**Strategic Equality Plan Annual Report  
Appendix 1: Action Plan and Strategic Objectives**

## IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report :

Signed: **WS Walters**

Director of Regeneration and Policy

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
<b>YES</b>	<b>YES</b>	<b>NONE</b>	<b>NONE</b>	<b>NONE</b>	<b>YES</b>	<b>NONE</b>
<p><b>1. Policy, Crime &amp; Disorder and Equalities</b> The development and publication of a Strategic Equality Plan is a Statutory responsibility.</p>						
<p><b>2. Legal</b> There are legal obligations to non-compliance with the Equality Act 2010.</p>						
<p><b>6. Staffing Implications</b> The publication of a Workforce monitoring report is a statutory duty. This report is published separately, due to its detailed nature.</p>						

## CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: **WS Walters**

Director of Regeneration and Policy

1. **Scrutiny Committee** – Policy and Resources - 6<sup>th</sup> December
2. **Local Member(s)** - n/a
3. **Community / Town Council** - n/a
4. **Relevant Partners** - A variety of organisations and individuals have been consulted with to collect data and opinions.
5. **Staff Side Representatives and other Organisations** - n/a

### Section 100D Local Government Act, 1972 – Access to Information

#### List of Background Papers used in the preparation of this report:

Title of Document	File Ref No.	Locations that the papers are available for public inspection
Equality and Human Rights Commission Guidance for the Public Sector in Wales		<a href="http://www.equalityhumanrights.com/wales/publications/guidance-on-the-equality-duty-for-the-welsh-public-sector/">http://www.equalityhumanrights.com/wales/publications/guidance-on-the-equality-duty-for-the-welsh-public-sector/</a> or through Llinos Evans ( <a href="mailto:LlinEvans@cararthenshire.gov.uk">LlinEvans@cararthenshire.gov.uk</a> / 01267 224914)
Carmarthenshire County Council's Strategic Equality Plan 2016-20		<a href="http://www.carmarthenshire.gov.uk/english/council/pages/equalitydiversity.aspx">http://www.carmarthenshire.gov.uk/english/council/pages/equalitydiversity.aspx</a> or through Llinos Evans ( <a href="mailto:LlinEvans@cararthenshire.gov.uk">LlinEvans@cararthenshire.gov.uk</a> / 01267 224914)

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# Strategic Equality Plan

## Annual Report 2016-17

If you require this information in large print, Braille, on audio tape or disk, please contact the

Policy and Partnership Team  
County Hall  
Carmarthen  
SA31 1JP

01267 224914

[equalities@carmarthenshire.gov.uk](mailto:equalities@carmarthenshire.gov.uk)



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## Strategic Equality Plan Annual Report 2016-17

We are pleased to present Carmarthenshire County Council's Annual Report for 2016-17 detailing the implementation of our Strategic Equality Plan. As a Council, we recognise the value of diversity in our county and we are proud of the work that has been done so far. Nevertheless, we recognise that there is more work to be done and we look forward to developing partnerships with our communities and with the protected groups in order to learn more.

Strategic Equality Plans (SEPs) are important documents that set out how public bodies will consider the needs of groups with 'protected characteristics', as outlined in the Equality Act 2010. This is intended to ensure that all individuals receive just and equitable treatment in respect of service delivery and strategy/policy formulation.

As a key employer in the county, we have made the transition from the Disability Two Ticks Scheme to being a Disability Confident Employer. **As a Disability Confident Employer we:**

- have undertaken and successfully completed the Disability Confident self-assessment
- are taking all of the core actions to be a Disability Confident employer
- are offering at least one activity to get the right people for our business and at least one activity to keep and develop our people.

I am pleased to say that further enhancements have been made to ensure the **accessibility of the Council's website**. Around 20% of the population have reading difficulties (due to dyslexia, learning difficulties or mild visual impairments). For this reason, we have added **Browse Aloud** software to the corporate site, which enables users to listen to web content in English or Welsh.

It has also been a productive year, advancing fairness in partnership with community groups.

As an Executive Board, we have a dedicated Disability Champion, which is Cllr. Jane Tremlett. During the year we have established the Carmarthenshire Disability Partnership, with members of the **Carmarthenshire Disability Coalition for Action**. Our aim is to discuss key issues and ensure that the Coalition are involved at the early stages of service planning and delivery and that we as an Authority support the group to develop further expertise and knowledge. I look forward to seeing this partnership develop further in the future.

We continue to host a **Community Cohesion Co-ordinator** who co-ordinates the Community Cohesion National Delivery Plan. We also continue to host Equality Carmarthenshire as a group of organisations who represent the protected characteristics and a range of public service providers.

To end, I want to report on arrangements for consulting on the **Council's budget**. It is well known that budget pressures are intensifying over the coming years. I am firmly committed to making sure that, as far as is possible, budget reductions are fair to all groups.

In view of this, arrangements were put in place to consult widely, including with the 50+ Forum and others on which Council services were considered most important. Later in the process, a **budget consultation survey** was developed and all sectors of the community were encouraged to take part. This included representatives of Equality Carmarthenshire. The survey asked people demographic profiling questions, meaning that the views of people from different groups could be understood separately. In summary, this activity helped ensure fairness was integral to the Council's budget decisions.

We have worked closely with other public bodies in the development of the Plan, and we look forward to building on this good work. In the same way, we are eager to learn more from the groups in our county who work tirelessly to raise awareness and celebrate diversity.

Naturally, our legal duties are central to all planning and delivery of services, and our workforce has a key role to play in promoting diversity and addressing unfairness.

**Councillor Linda Evans**  
**Executive Board Member (Equalities)**



## Section 1 - Introduction

### 1.1 Introduction and background

#### Public Sector Equality Duties

##### The General Duty

The aim of the General Duty is to ensure that public authorities and those who carry out a public function consider how they can positively contribute to a fairer society through advancing equality and good relations in their day-to-day activities.

Public bodies are required to have due regard to the need to:

1. Eliminate unlawful discrimination, harassment and victimisation and other conduct that is prohibited by the Act
2. Advance equality of opportunity between people who share a relevant protected characteristic and those who do not
3. Foster good relations between people who share a protected characteristic and those who do not.

##### Specific duties in Wales

The Equality Act 2010 made provision for Welsh Ministers to be able to make regulations that place specific public sector equality duties on relevant Welsh public authorities listed in Part 2 of Schedule 19 of the Act.

The duties have been developed to be proportionate in design, relevant to need, transparent in approach and tailored to guide relevant Welsh public authorities towards better performance of the general duty. The ambition is to better meet the needs of the citizens of Wales relying on the services provided to them by the public sector.

The Specific Duties in Wales are set out in the Equality Act 2010 (Statutory Duties) (Wales) Regulations 2011 and came into force on 6 April 2011 and note that the listed bodies will undertake and develop the following requirements:

- Objectives
- Strategic Equality Plans
- Engagement
- Assessing Impact
- Equality information
- Employment information
- Pay differences
- Staff training
- Procurement
- Annual reporting (by Public Authorities and Welsh Ministers)

- Publishing
- Review
- Accessibility

## **Carmarthenshire County Council**

Carmarthenshire County Council published its second Strategic Equality Plan in April 2016 and this review brought an opportunity to look at what has been achieved and to look anew at our priorities as a Council.

Our complaints and compliments procedure is also key to ensuring better services. We will ensure that any complaint, compliment or comment regarding equality is recorded as those relating to equality and we will monitor the situation and report on progress in dealing with them. We intend to strengthen these links and we will ensure that communities, key stakeholders and individuals / groups that represent one or more of the protected characteristics are aware of our procedure.

The Policy and Partnerships team works closely with the People Management Division and all council departments to promote the Strategic Equality Plan and to continue to gather evidence which will contribute to the work. The team also works closely with stakeholders over the county, and meet regularly with groups such as the Carmarthenshire Disability Coalition and Equality Carmarthenshire.

### **1.2 Any other information relevant to meeting the duties**

#### **Our role as an Employer**

##### **Time to Change Wales**

Time to Change Wales is the first national campaign to end the stigma and discrimination faced by people with mental health problems. The campaign is needed because although mental health problems are very common, it can still be a taboo subject. People who experience mental illness often face stigma and discrimination in the workplace, socially and within families. This can make life with a mental health problem more difficult than the symptoms themselves. The aim is to improve knowledge and understanding about mental illness and, most importantly of all, get people talking about mental health.

The Occupational Health Team lead on our corporate commitment to the national campaign and have hosted various awareness campaigns such as the 'Time to Talk Day' and the Pledge Cards with the Chief Executive and Elected Members.

##### **Domestic Abuse and Sexual Violence Policy**

The Council recognises that its employees, men or women, will be amongst those affected by domestic abuse and sexual violence, either as victims/survivors of domestic abuse and/or sexual violence; friends, family or colleagues of victims/survivors; or perpetrators of domestic abuse and/or sexual violence. We have prepared and published a Domestic Abuse and Sexual Violence Policy, which is

available to view in the HR Policies and Guidance Section of the intranet, via line managers, Trade Union Representatives or the Occupational Health Unit. Carmarthenshire County Council is committed to ensuring that any member of staff disclosing domestic abuse and/or sexual violence will be listened to and supported.

The Violence against Women, Domestic Abuse and Sexual Violence (Wales) Act 2015 is a landmark law, the first of its kind in the UK. One of the key mechanisms for delivering the Act in Wales is to ensure that everyone working in Welsh Public Service is aware the nature and impact on those affected by this whatever their gender.

The Learning and Development team have ensured access to the mandatory Welsh Government e-learning module on Violence Against Women, Domestic Abuse and Sexual Violence for all staff. This e-learning provides awareness of the issues and importantly provides an understanding about how staff might help in tackling them.

The Corporate Management Team were committed to ensuring that every part of our workforce has the opportunity to receive the awareness training with alternative arrangements being made available for those who cannot access e-learning. Additional training was also provided for those undertaking professional/specialist roles.

### **Our role as a provider of services**

#### **Wales Interpretation and Translation Service**

The authority is a partner in the Welsh Interpretation and Translation Service (WITS). This body acts as a “one-stop-shop” designed to improve access to public services for vulnerable people whose first language may not be English or Welsh. WITS provides the Authority with access to trained, accredited, fully security vetted translators and interpreters covering approximately 135 languages.

#### **Inequalities in Education**

The eligibility for Free School Meals (e-fsm) along with information in relation to Looked After Children (LAC) are key measures used by the Welsh Government as indicators of pupil deprivation. There is evidence that eligibility for free school meals impacts on a child’s attainment at school. E-fsm pupils are 2.5 times less likely to get A\*-C grades in core subjects than their ineligible peers. Eligibility for free school meals also has a relationship with school attendance.

All schools are required to publish **Equality Objectives** and a **Strategic Equality Plan** that records how the school is responding to equality issues. The purpose of the objectives and plan is to enable the delivery of measurable equality outcomes which improve the lives of individuals and communities.

Schools access and have to evidence how they utilise the **Pupil Development Grant (PDG)**. The PDG is the Welsh Government's means of providing additional financial support for e-fsm learners and to address the three national priorities:

- improving standards in literacy;
- improving standards in numeracy, and
- Reducing the impact of poverty on educational attainment.

Schools have to develop strategies for the use of PDG and report on its impact on the e-fsm group of learners. In 2016/17 the PDG entered its fourth year and equates to £1,150 per pupil.

### **Carmarthenshire Minority Ethnic Achievement Service (MEAS)**

This year we have seen only a small rise in our English/Welsh as an Additional Language (EAL/WAL) population. We currently have in excess of 1200 EAL learners on our register and support 400+ A-C Stage learners in 40 schools throughout Carmarthenshire. This year we have been able to increase our support in Welsh medium schools.

The MEAS team currently consists of 4 EAL Specialist Teachers, 2 Polish Bilingual TAs and 3 Arabic Bilingual TAs who work with refugee children and their families.

### **Carmarthenshire Traveller Achievement Service**

This year the service has been able to support 6 secondary schools and 7 primary schools. We currently have 171 children on our register, not all of whom are currently receiving support.

There has been an overall improvement with attendance from Traveller children over the past year. This has impacted slightly on improving their attainment levels in primary schools.

### **Stonewall Education Champions**

Stonewall's Education Champions programme provides support and guidance to local authorities in tackling homophobia and homophobic bullying in their local schools. The Education Champions programme has been developed following the huge success of Stonewall's [Diversity Champions programme](#).

The Education & Children's Services Department are members of the programme and will work with Stonewall to establish ways in which we can address homophobic bullying and promote a safe and inclusive learning environment for all young people.

**Housing Related Support Service** – Housing Services have developed a new Housing support service for people over the age of 55 and people with dementia irrelevant of age. This will be across tenure (private or public) and be given where the need for housing related support has been identified.

If someone has housing support needs they will receive support irrelevant of whether they are a Carmarthenshire County Council tenant or not. This will be a much fairer service, extending to those who are home owners or private tenants'. The service will be a floating support service for Older People which will provide

housing related support to enable people to develop the skills and confidence needed to live independently in their own homes.

### **Assisted waste collection**

There are over a 1,000 people currently receiving our assisted waste collection service and the scheme is widely publicised in the Easy Guide to Recycling Rubbish (sent to every household) and Carmarthenshire News.

Assistance can be given with blue bag and food waste recycling and help with bulky waste is also available for qualifying people.

### **Disability Discrimination Act (DDA) works – highways and walking/cycling routes**

Dropped crossings incorporating DDA features, such as tactile paving have been installed at over 430 locations across the County. Further work is on-going as part of normal footway / highway maintenance schemes. Safer Routes in Communities schemes are DDA compliant where possible (steep gradients being the exception) with the introduction of additional accessibility features on some routes.

### **Library Services**

During the year, Carmarthenshire Libraries have held drop in sessions to help people with sight loss to go online.

From June to December the RNIB delivered the sessions in order to support people with sensory loss. The project 'Online Today', offers advice and guidance on technology, and helping people to develop skills and confidence in using technology.

To make the best use of these drop in sessions and to support the RNIB's campaign of MANIL (Making Noise in Libraries) 2016, Carmarthenshire Libraries demonstrated the numerous free audio visual services provided.

### **Our role as a Community Leader**

#### **Syrian Resettlement Programme in Carmarthenshire**

Carmarthenshire County Council is committed to welcoming 60 households over a five year period from April 2016. Council members voted unanimously in favour of participating in the Home Office scheme in autumn 2015, and this has received firm backing of Executive Board.

The scheme is co-ordinated by a multi-agency steering group, which meets monthly. Chaired by the Executive Board Member for Housing and Equalities, it has high-level representation from Hywel Dda Local Health Board, Education, Housing, Dyfed Powys Police, Communities First, Job Centre, Coleg Sir Gâr, Carmarthenshire Association of Voluntary Services, the Project Manager and our support agency, Ethnic Youth Support Team.

The Council sources suitable homes through our in-house social lettings agency, Simple Lettings. The properties are all well-maintained, carpeted and decorated to a high standard by the property owner. Furnishing is paid for by the Council, but arranged by the support agency. Rents are paid at Local Housing Allowance level. Simple Lettings charges a management fee from this, and the remainder is passed on to the property owner. Simple Lettings arranges minor repairs, heating maintenance and so on once the tenant is in the property.

So far, 14 families have arrived in Carmarthenshire, with a total of 66 family members, which are in Llanelli (6), Ammanford (1), Llandeilo (1), Pontyberem (2), Kidwelly (1) and Carmarthen (3). We are on target to deliver Carmarthenshire's pledge of resettling 60 families.

The Coleg Sir Gâr representative also represents Syria Sir Gâr, a voluntary support group which has been set up to provide informal support to the refugee families, which is over and above what can be provided through the Home Office scheme. Syria Sir Gâr has held open meetings in areas where refugees are about to arrive. This allows members of the local community to ask about how the scheme works and to have their questions answered in a relatively informal setting. It also informs local people about how they can get involved in supporting the families.

This has proved very successful, with Syria Sir Gâr being able to put out a call for things that are needed by the families, such as a bicycle for a teenager, or homework support after school.

Welsh Government 'Welcome to Wales' packs have been provided to all the families in Arabic and English, and in adult and child-friendly versions. Carmarthenshire has also provided a local supplement in Arabic and English, which covers the basics about local services and how to access them.

Carmarthenshire has set up and delivered an effective support system for the Syrian families, and is well-placed to meet our commitment of receiving 60 families within five years. We have compensated for a lack of experience in this area of work by bringing all the relevant agencies together, and a willingness to learn from others. Our success to date has been recognised by mentions in recent reports by Welsh Government and the British Academy

### **Community Cohesion**

A Regional Community Cohesion Co-ordinator was funded by Welsh Government from the Community Cohesion Fund to work with Carmarthenshire, Ceredigion, Powys and Pembrokeshire County Councils.

The Co-ordinator facilitates the regional implementation of the Community Cohesion National Delivery Plan and creates numerous links with organisations working across the region. During the year we have been able to access learning and development opportunities, focusing on Hate Crime awareness.

Victim Support held sessions with a group of staff and focussed on increasing knowledge of the protected groups and ensuring that staff understood some of the barriers faced by victims.

The session looked at the definitions of the protected groups covered by the hate crime legislation and the definition of a hate crime, but went into further details about the issues / barriers or challenges faced by those groups.

During these sessions, there was a greater emphasis on Hate Crime and assisting participants develop a few new skills when working with victims who have a learning difficulty, so that the victim's voice is heard.

**Equality Carmarthenshire** is a group of organisations who represent the protected characteristics of the Equalities Act and local service providers.



During the year, Equality Carmarthenshire has developed and promoted a “More in Common” campaign and have taken to the streets to promote the message that we all have More In Common with a series of stalls in Llanelli, Ammanford and Carmarthen.

The campaign is part of a national effort to stop the escalation of Hate Crime which has been seen in the aftermath of the Brexit vote. Although Carmarthenshire didn't see an increase in reports of rising hate crime that have been seen in other parts of the country, it is important that we are not complacent. The aim was to promote a positive message that we are all equally valued and we all have a part to play in our community.

Equality Carmarthenshire also hosted a consultation meeting on the Carmarthenshire Wellbeing Assessment consultation, supported by the Carmarthenshire Public Services Board (PSB). This was an opportunity for the members to discuss what well-being means to people and an opportunity to input to the Assessment consultation which helped identify what matters most to people in Carmarthenshire. The forum will continue to be involved with the development of the Well-being Objectives and Well-being Plan, with regular updates from the Policy and Partnership Team at meetings.

## **Carmarthenshire Disability Coalition**

The Council continues to support the work of the Coalition and benefits from its feedback and advice. For instance, work has been undertaken to improve the accessibility of information, this includes work to ensure that the Council's website is fully accessible to screenreader software, electronic documents are now published in single language versions and improvements have been made to the format of printed letters to help accessibility. As a further example, the Coalition are working with our leisure section on designing works to improve the accessibility of paths at Pembrey Country Park. Relationships between the Council and the Coalition have been enhanced through bi-monthly meetings between the Executive Board Member for Disabilities, Cllr Jane Tremlett, and the Chair and key officers from the Coalition.

## **50+ Forum**

The 50+ Forum participated in the SEP consultation and has made a considerable contribution to the Council's Ageing Well Plan, through supporting the consultation and championing the Plan.



## Section 2 - Identifying, collecting and using relevant information

### 2.1 Our communities

#### Statistical background

Carmarthenshire has an estimated population of 184,681 and a population density (population count/area in sq km) of 78 people per square km. The County is very diverse and rural. It consists of 58 Electoral Wards with 74 Elected Members. Demographic Profiles have been produced of each of the Electoral Wards and for the County which provides a picture of life in the individual communities as well as valuable local information. The profiles will give you information such as:

- Population Statistics
- Population density
- Birth and Death rate
- 2011 Census Data
- Housing Information

The [Ward Profiles](#) can be accessed through the corporate website.

Statistical information provides us with a useful baseline of information; however, the Census results do not provide information on all protected characteristics.

As a local authority, we are able to access a wealth of data. Our key aim during the preparation of the evidence report was to identify data to support the General Duty in:

1. Eliminating unlawful discrimination, harassment and victimisation and other conduct that is prohibited by the Act
2. Advancing equality of opportunity between people who share a relevant protected characteristic and those who do not
3. Fostering good relations between people who share a protected characteristic and those who do not.

### 2.2 Our staff

Carmarthenshire County Council has been collecting employment data for a number of years, on the groups required at the time. Our Workplace Profile Report can be viewed on our corporate website. Following the publication of Equality Act 2010 and the Specific Duties for Wales 2011, the People Management division have been working to update our recruitment monitoring forms and our Resource Link software, in order to collect the new data on the wider protected characteristics. This is a continuous process.

## **Section 3 – Equality Impact Assessments**

### **Equality Impact Assessments**

Equality Impact Assessments are a key element of the Strategic Equality Plan and objectives and are integral to all budgetary, policy and strategy decisions. Heads of Service and Budget Managers are required to complete an assessment of all policy decisions as part of the Priority Based Budgeting decisions and all assessments. It is also key that assessments are undertaken as part of all policy and strategy developments and that the Organisational Change template is completed when there are HR considerations.

During the year, the Policy and Partnership Team have been leading on the preparation of a draft Integrated Assessment. This is due to the fact that the Council has a statutory requirement to complete impact assessments under a number of new and existing legislation.

These requirements are legal obligations for the Council and failure to meet these duties may result in the Council being exposed to legal challenge.

This integrated assessment incorporates the requirements of the following Acts into one Impact Assessment:

- Well-being of Future Generations (Wales) Act 2015
- Public Sector Equality Duty and the Equality Act 2010
- Welsh Language Measure 2011 and Welsh Language Standards
- United Nations Convention on the Rights of the Child (UNCRC) & Rights of Children and Young Persons (Wales) Measure 2011
- Environment (Wales) Act 2016 – Biodiversity and Resilience of Ecosystems Duty

## **Section 4 – Training**

The Council's Learning and Development Team prepare an annual Learning & Development Plan which outlines all the training and development opportunities available - including Equality and Diversity opportunities. Line Managers are required to discuss learning and development opportunities as part of staff appraisal and ensure that staff have opportunities to develop professionally. All new members of staff are required to complete "Engaging Diversity", an on-line learning module within six months of appointment. All Managers and Senior Managers are required to attend the Dignity at Work training and, if involved in recruitment activities, Recruitment and Selection Training.

## Section 5 – Procurement arrangements

### Procurement arrangements

The Policy and Partnership Team work closely with the Procurement Unit to ensure compliance. One of the key documents is the Supplier Qualification Information Database (SQuID). This Information is a template provided by the Value Wales Division of the Welsh Government.

The SQuID has been designed to simplify and standardise the selection stage of procurement whilst improving transparency. This approach also makes it easier for small businesses to tender for public sector contracts. Information in relation to Equalities is included in the SQuID documents and all potential suppliers must complete the section. The SQuID template specifically asks prospective suppliers for information in relation to any findings of unlawful discrimination by an Employment Tribunal, an Employee Appeal Tribunal, or any other court and/or any complaints upheld following an investigation by the Equality and Human Rights Commission or its predecessors (or comparable body in any jurisdiction other than the UK) on grounds of alleged unlawful discrimination. The guidance clearly notes that any prospective suppliers, who hold any findings against them, will not be selected to tender, unless they have provided adequate evidence that they have taken appropriate action to stop it happening again.

## Section 6 – Contact details

For further information on Carmarthenshire County Council’s Strategic Equality Plan, please contact the

Policy and Partnership Team  
County Hall  
Carmarthen  
SA31 1JP

01267 224914

[equalities@carmarthenshire.gov.uk](mailto:equalities@carmarthenshire.gov.uk)

You can also contact Carmarthenshire Direct by text

0789 2345678

<p><b>Our role as an Employer:</b> We are the county’s largest employer and have a workforce exceeding 8,000 (including school based staff). We are committed to ensuring equality within our workforce and we want to be an exemplar of good practice to other employers.</p>	
<p><b>Equality Objective: Attract and retain the very best workforce</b></p>	
Action	Status and update
<p>Attract and retain talent by positively encouraging applicants and employees from underrepresented groups to apply for jobs and career progression opportunities within our organisation.</p>	<p>CCC publicises a positive action strapline within all recruitment advertisements and if posts are under-represented encourages applicants to apply. All external adverts are publicised on our accessible corporate website and applicants can apply online or via hard copy application and request if required. Signposting advertisements are placed in specialist press or participate at recruitment events to attract applicants. As a Disability confident employer we are committed to the obligations to supporting applicants with disabilities through the recruitment process.</p>
<p>Develop an overarching behaviour statement aligned to our newly developed core values to</p>	<p>Research and consultation was undertaken to develop a</p>

<p>ensure employees and managers appreciate and understand the Equality Duty and how it relates to their role in our organisation</p>	<p>set of core behaviours to support leadership and management and underpin the Council’s revised Core Values.</p> <p>CMT received an update on progress and were supportive of the core behaviours requiring that they be developed and integrated as part of the People Strategy.</p> <p>Further work has been undertaken to apply the behaviours through learning and development interventions and to support the delivery of the model.</p> <p>The ‘Lead’ Work stream (People Strategy Group) will support this work, ensure ongoing engagement and will monitor its progress as part of the agreed priorities for the People Strategy.</p>
<p>Develop employment policies and promote initiatives that support our employees through periods of organisational change, work related or personal challenge e.g. Stress management, mental health awareness, domestic abuse and sexual violence support</p>	<p>CCC has adopted a Restructure policy to advise and support managers on a clear and transparent process for managing organisational change and to support employees through the restructure process.</p>
<p>Provide the framework for managers to develop a positive working environment to support regular attendance, advise managers and monitor consistency, e.g. reasonable adjustments for a disability, flexible working for caring responsibilities, time off for religious observance</p>	<p>CCC has a broad HR policy framework in place to support and advise managers and employees including Sickness Absence policy, Disability Information &amp; Reasonable Adjustments guidance, Flexible Working policy, Time Off policy, Career</p>

	<p>Break policy, Supporting LGBT Staff in the Workplace guide, Supporting Maternity/Adoption Returners guide, Religion &amp; Belief guide, Behavioural Standards in the Workplace guide</p>
<p>Develop an integrated programme of Welsh Language development for our employees</p>	<p>L&amp;D Advisor Welsh Language is supporting the development of the Welsh Language Plan / Strategy which has been separated into three areas:</p> <ul style="list-style-type: none"> <li>• To support recruitment of new staff</li> <li>• Develop the current workforce</li> <li>• Embed language into the organisational culture</li> </ul> <p>Key documents/information have been made available including 1) Welsh Learning Agreement to achieve the desired level for an employee’s job role. 2) A guide to summarise the different pathways &amp; methods available to reach various levels. 3) Update L&amp;D Web Page For Welsh Language. 4) Marketing posters created for the 10 hour online course, &amp; Welsh for everyone.</p> <p>Analysis of skills profile with appropriate interventions &amp; corporate support to get employees from Level 0 to Level 1 via online learning &amp; alternative learning methods commenced</p>
<p>Use the Work Ready Project (apprenticeships, graduate, work experience, work placements, volunteering) to attract and retain underrepresented groups, e.g. Young people, people with</p>	<p>Recruitment has begun for a new tranche of Apprentices and Graduate, broadening the range of opportunities provided. Access to Work Experience continues to be</p>

<p><b>Develop an integrated programme of Welsh Language development for our employees</b></p>	<p><b>L&amp;D Advisor Welsh Language is supporting the development of the Welsh Language Plan / Strategy</b></p>
<p>disabilities, and monitor outcomes</p>	<p>popular, with the on-line application form increasing participation  <b>which has been separated into three areas:</b></p> <ul style="list-style-type: none"> <li>• <b>To support recruitment of new staff</b></li> </ul>
	<ul style="list-style-type: none"> <li>• <b>Develop the current workforce</b></li> <li>• <b>Embed language into the organisational culture</b></li> </ul> <p><b>Key documents/information have been made available including 1) Welsh Learning Agreement to achieve the desired level for an employee’s job role. 2) A guide to summarise the different pathways &amp; methods available to reach various levels. 3) Update L&amp;D Web Page For Welsh Language. 4) Marketing posters created for the 10 hour online course, &amp; Welsh for everyone.</b></p> <p><b>Analysis of skills profile with appropriate interventions &amp; corporate support to get employees from Level 0 to Level 1 via online learning &amp; alternative learning methods commenced</b></p>
<p><b>Use the Work Ready Project (apprenticeships, graduate, work experience, work placements,</b></p>	<p><b>Recruitment has begun for a new tranche of</b></p>



<p><b>volunteering) to attract and retain underrepresented groups, e.g. Young people, people with disabilities, and monitor outcomes</b></p>	<p><b>Apprentices and Graduate, broadening the range of opportunities provided. Access to Work Experience continues to be popular, with the on-line application form increasing participation</b></p>
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<p><b>Our role as an Employer:</b> We are the county’s largest employer and have a workforce exceeding 8,000 (including school based staff). We are committed to ensuring equality within our workforce and we want to be an exemplar of good practice to other employers.</p>	
<p><b>Equality Objective: We will work to improve employment monitoring data held by the local authority and ensure pay differentials are identified and acted upon</b></p>	
<p><b>Action</b></p>	<p><b>Status and update</b></p>
<p>Maintain our targeted campaign to encourage employees to voluntarily declare equality monitoring information to reduce data gaps and better understand the composition of our workforce</p>	<p>CCC continues to encourage recruitment applicants as part of the recruitment process and employees via Resource link self-service facility to voluntarily declare equality monitoring information. This information is used to inform the Annual Workforce information Report and Corporate/Departmental Workforce Reports to inform Departmental workforce planning process.</p>
<p>Support the provision of workforce data to schools to enable each to fulfil its statutory responsibility for annual strategic equality reporting</p>	<p>CCC continues to respond to requests from schools for employment and equality data relating to employees locally employed by the respective school to inform individual school workforce and equality planning.</p>
<p>Undertake an annual Equal Pay audit to identify and understand our actual pay gaps and/or pay discrepancies and develop actions for improvement</p>	<p>CCC undertakes and publishes an annual Equal Pay Audit, investigates any pay gaps and/or pay anomalies and develops actions for improvement.</p>

<p>Apply the Gender Employment and Pay Analysis (GEPA) method to our workforce information and pay data to identify any potential employment disparities and develop actions for improvement</p>	<p>CCC applies to GEPA method to analyse workforce information and pay data to inform the annual workforce information report, Corporate and departmental workforce people management data reports to identify trends and areas requiring further investigation. This is to support the development of corporate and departmental workforce planning.</p>
<p>Utilise our workforce information to inform succession and workforce planning and develop business objectives that support equality improvement</p>	<p>CCC utilises workforce information within the annual workforce information report, corporate and departmental people management reports to support departmental workforce planning process.</p>
<p>Continue to advise and support business units during service reconfiguration to ensure workforce impact is assessed appropriately</p>	<p>The People Services and Equality teams continues to advise and support service managers during periods of organisational change in line with the Restructure policy including undertaking equality impact assessments.</p>

<p><b>Our role as a service provider:</b> We provide around 300 different services to local people, which are as diverse as providing the local education service, refuse collection, caring for vulnerable older people or children, providing leisure facilities, maintaining highways and as landlord for 9000 council homes. We wish to ensure that all of our services are provided in accordance with the commitments contained in this Strategic Equality Plan.</p>	
<p><b>Equality Objective:</b> We will continue to work to remove the barriers to accessing Council services and give due regard to all groups when making decisions</p>	
<p><b>Action:</b></p>	<p><b>Status and update</b></p>
<p>Continue to implement accessibility improvements to the CCC website</p>	<p>The Marketing and Media team are leading on the accessibility improvements to the website, which include the development and monitoring of Browse Aloud. The default position is that single language documents are now used. Modern.gov has been adapted so that pages are now viewable in HTML format.</p>
<p>Encourage public feedback on accessibility issues</p>	<p>The Executive Board Disability Champion has established a Carmarthenshire Disability Partnership, which meets regularly with members of the Disability Coalition. Members have prepared a rolling action plan, which identifies key issues such as accessible information, parking and design access statements.</p>

<p>Continue to make sure equality impact assessments (EIAs) are embedded within the decision making process and as part of responsibilities under the Well-being of Future Generations Act</p>	<p>During the year, the Policy and Partnership Team have been leading on the preparation of an Integrated Assessment. This is due to the fact that the Council has a statutory requirement to complete impact assessments under a number of new and existing legislation.</p>
<p>Support the EIA process by developing a series of community profiles, showing key facts for specified demographic groups</p>	<p>The ward profiles have been prepared and are updated regularly in light of any new data / local information. They are available on the corporate website and have been provided to all Elected Members.</p>
<p>Monitor complaints which have an equality dimension as a means of triggering service improvement</p>	<p>All complaints received are logged and monitored through an information management system, which includes a category to monitor any complaints in relation to Equality &amp; Diversity.</p>
<p>Ensure all contracting arrangements (including review) include appropriate stipulations under the 2010 Equality Act</p>	<p>The Procurement Unit regularly update the information which is included in all contracting arrangements</p>
<p>Support key engagement mechanisms, including Equality Carmarthenshire, the Disability Coalition, the 50+ Forum and Youth Council</p>	<p>The Policy and Partnership Team / Strategic Development Team continue to support these key engagement mechanisms.</p>

<p>Develop a pilot project on countryside access path improvement at Pembrey Country Park, in collaboration with the Disability Coalition</p>	<p>During the year we have appointed to the Senior Outdoor Recreation Manager post and they will be invited to meet with the Carmarthenshire Disability Partnership to discuss key issues.</p>
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<p><b>Our role as a service provider:</b> We provide around 300 different services to local people, which are as diverse as providing the local education service, refuse collection, caring for vulnerable older people or children, providing leisure facilities, maintaining highways and as landlord for 9000 council homes. We wish to ensure that all of our services are provided in accordance with the commitments contained in this Strategic Equality Plan.</p>	
<p><b>Equality Objective:</b> Help maximise the potential of people, through the education system and by supporting the growth of the local economy</p>	
Action	Status and update
<p>To develop a knowledge economy and innovation through the Workways+ Project identified in the County Wide Employment &amp; Skills Plan to increase the employability of Economically Inactive and Long Term Unemployed people aged 25 and over, who have complex barriers to employment</p>	<p>Since June 2016, the Workways+ project has engaged with 200 participants who are either long term unemployed or economically inactive. The project supports participants by providing one to one mentoring, tailored job search, volunteer placements, qualifications and funding for subsidised jobs. The project is currently achieving a 30% job entry rate for participants upon leaving the project.</p>
<p>We will increase % of pupils eligible for Free School Meals who achieved the Level 2 threshold including a GCSE grade A*-C in English or Welsh first language and mathematics</p>	<p>The Authority has worked collaboratively through a Task and Finish Review in support of ‘Narrowing the Attainment Gap for Learners eligible for free school meals.’ This extensive piece of work produced an informative and practical document for use as a valuable resource across our schools. Its key messages include:</p> <ul style="list-style-type: none"> <li>• Carmarthenshire schools place much</li> </ul>

	<p>emphasis on raising standards and achievement for eFSM learners through a range of early interventions and enhanced curriculum opportunities. This work has secured enriched experiences and improved outcomes.</p> <ul style="list-style-type: none"> <li>• Our schools are able to evidence numerous elements of ‘good practice initiatives’ (as presented to the Task and Finish Group) which are effective in reducing the impact of poverty on eFSM learners’ engagement and potential.</li> <li>• Analyses of performance data over time demonstrates that standards continue to rise at the end of all key stages for e-FSM learners.</li> <li>• Effective school leadership and working in partnership are central to tackling this issue in a sustainable manner.</li> </ul>
<p>We will deliver literacy, numeracy and English for speakers of other languages (ESOL) courses for Carmarthenshire residents and in-comers to the County</p>	<p>A full and continuing programme of literacy, numeracy and ESOL classes were offered at centres in Llanelli, Ammanford and Carmarthen for 2016-17 and enrolments in these classes has been good.</p>
<p>We will support schools, in tandem with ERW, to further improve outcomes for all pupils but with a particular emphasis on raising the achievements of pupils entitled to free school meals</p>	<p>We continued to hold all schools and ERW to account for further improving standards and</p>



<p>and looked after children</p>	<p>outcomes for learners, intervening in schools where performance is not satisfactory. We undertook Core Visits for evaluation of school performance outcomes and undertaking of National Categorisation and review Teaching and Learning provision. The LA Scrutiny Panel has continued its valuable work through inviting a range of schools across all phases to present an overview of their progress, success and areas of concern to the Panel. The ongoing monitoring and scrutiny of our 'Schools Causing Concern' has continued to be challenged and supported.</p>
<p>We will fully implement the Vulnerability Assessment Profile in all Secondary Schools for Years 7-11 to ensure early identification of all young people who may become NEET</p>	<p>The identified elements of the Youth Engagement and Progression Framework have been delivered in-county. Vulnerability Assessment Profile (VAP) meetings are now taking place on a termly basis in all Carmarthenshire Secondary Schools. These meetings identify young people at risk of becoming NEET and enable extra support to be provided for them, in some cases via the Cynnydd European Social Fund bid.</p>
<p>We will ensure a new Vulnerable Young Peoples panel be put in place to co-ordinate support for vulnerable young people in Key Stage 4</p>	
<p>We shall further develop the family engagement programme to support families to engage in education</p>	<p>The Education Welfare Service continued to deliver a range of programmes for families particularly engaging with more hard to reach, vulnerable</p>

	<p>families. The Family Learning Signature (FLS) continues to be supported through some schools in Llanelli, with families engaging in their child's learning. There was positive feedback from families reporting that they feel more able to support their child's attendance</p>
<p>We shall ensure that all pupils aged 15 who leave compulsory education, training or work based learning with an approved external qualification</p>	<p>Three Carmarthenshire pupils left compulsory education without a qualification (LENQ). This is the first time any pupil has left without a qualification for four years. All three pupils were targeted for additional interventions via the Vulnerability Assessment Profile and received additional support from their School, Educational Welfare and Childcare teams. However, due to case sensitive situations, the three pupils did not achieve a pass in an externally recognised qualification. All three young people are currently being supported by the Youth Support Service.</p>
<p>We will continue to advance the objectives of the Welsh in Education Strategic Plan</p>	<p>The Welsh in Education Strategic Plan 2017-2020 has been reviewed during the last 12 months in line with the most recent Welsh Government guidance, issued in September 2016. This will allow us to further promote and increase bilingual education in</p>

	the County.
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<p><b>Our role as a community leader:</b> We wish to promote tolerance and understanding and to help build a cohesive and united community within Carmarthenshire. We will promote the principles of equality and diversity as set out in this Strategic Equality Plan through our working with partners and community organizations throughout the county.</p>	
<p><b>Equality Objective:</b> Support cohesive communities by promoting community and civic engagement</p>	
<p><b>Action</b></p>	<p><b>Status and update</b></p>
<p>Support the implementation of the Community Cohesion National Delivery Plan</p>	<p>The Regional Community Cohesion Co-ordinator sits on the Fair and Safe Communities Thematic Group. The Co-ordinator submitted written observations to a Fair and Safe Communities Work Shop. The Co-ordinator also sits on community safety partnerships and strategic equality groups across Ceredigion, Pembrokeshire and Powys. The Co-ordinator contributed a section on community cohesion to the Divisional Business Plan.</p>
<p>Hate Crime. Conduct and support awareness raising and signposting of victims to report and support services.</p>	<p>The Policy and Partnership Team are members of the Dyfed Powys Hate Crime Forum, which is facilitated by Dyfed Powys Police. During Hate Crime Awareness week the forum focussed its activity around raising awareness within our communities as to what a Hate Crime or Incident is and also, how the same can be reported.</p>

	<p>The campaign held by 'Equality Carmarthenshire' to promote that we have 'More in Common' also supported this work.</p>
<p>Deliver the Syrian Resettlement Programme. Support communities through changes due to immigration.</p>	<p>The Co-ordinator attended and contributed to meetings of the Syrian Refugee Task Groups in Carmarthenshire, Powys and Ceredigion and Panel in Pembrokeshire. The Co-ordinator represented the region at a meeting of the Wales Strategic Migration Partnership Local Authority Delivery Group. The Carmarthenshire paper on Children's Schemes was revised. Information sheets for professionals, volunteers and refugees were produced in Carmarthenshire for the Syrian Refugee Programme.</p>
<p>Fostering of Good Relations. Support the building of resilient and cohesive communities</p>	<p>The Co-ordinator attended meetings of Carmarthenshire Fair and Safe Communities Thematic Group, Pembrokeshire Community Safety Partnership and Powys Community Safety Partnership. The Co-ordinator met with Bawso (A specialist support provider for Black and Minority Ethnic Communities) regarding training and Crime stoppers regarding the Fearless Project for young people. The Co-ordinator also met with Dr Jasmin Tregidga of the All Wales Hate Research Project. The Co-ordinator discussed safeguarding training with</p>
<p>Engage with and support community groups that represent the Protected Characteristics.</p>	

Carmarthenshire Learning and Development. The Co-ordinator attended a meeting of Dyfed Powys Regional Anti-Slavery Group. The Co-ordinator is writing an Anti-Slavery Policy for Ceredigion that may be shared regionally and nationally. The Co-ordinator attended a meeting between the Home Office Extremism Analysis Unit and the Welsh Government.

<p><b>Our role as a community leader:</b> We wish to promote tolerance and understanding and to help build a cohesive and united community within Carmarthenshire. We will promote the principles of equality and diversity as set out in this Strategic Equality Plan through our working with partners and community organizations throughout the county.</p>	
<p><b>Equality Objective:</b> We will encourage healthy lifestyles and promote the importance of well-being</p>	
Action	Status and update
<p>To promote the Welsh language and ensure compliance with the ‘Active Offer’ across all service areas</p> <p>(Active Officer - Care providers must actively offer and deliver Welsh language care services to the same standard as English language care services as part of the More than Just Words Strategic Framework)</p>	<p>As part of a Corporate exercise looking at a skills audit in relation to the welsh language we are confident that services users are able to receive a service in welsh if they require it but that there is still some work to do to ensure total compliance with the active offer.</p>
<p>To implement actions within the Regional Dementia plan in line with the findings of the Older People’s Commissioner report “More than just Memory Loss”</p>	<p>The regional dementia group continues to meet with the aim that the regional plan will be ready for consultation in September 2017. This will then delivered locally.</p>
<p>Contribute to health led transformation programmes in mental health and redesign of services within learning disability</p>	<p>Officers are involved in the various workstreams the Health Board have created for this programme of work. The programme goes for public consultation during 2017-18 and a Members session is being convened to hear presentation.</p>
<p>Establish and promote an “everybody’s business” approach to safeguarding in Carmarthenshire</p>	<p>The Carmarthenshire Local Operational Safeguarding</p>

<p>working with local authority colleagues and partner agencies</p>	<p>group is now well established and well attended by various statutory and Non statutory organisations. This forum positively stimulates honest dialogue in relation to the collectively responsibility for keeping citizens safe. The agenda and discussion continues to evolve as does the performance data available to us. The everybody`s business approach to safeguarding is also supported by the ongoing operational partnership work between agencies and a variety of other relevant forums.</p>
<p>Deliver the affordable home delivery plan</p>	<p>We are working on a range of solutions including bringing empty homes back into use, social lettings, buying private sector homes, through developer contributions and Section 106 and by working in partnership with our housing association partners to develop new homes.</p>



## EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

### ANNUAL REPORT 2016/17 ON THE WELSH LANGUAGE

**Purpose:**

To receive the annual report in relation to the Welsh language and the introduction of the Standards during 2016-17

**Recommendations / key decisions required:**

To approve the annual report in relation to the Welsh language and the introduction of the Standards during 2016-17

**Reasons:**

It is a statutory responsibility for the Authority to implement the Welsh language Standards. As part of the Standards, we must publish an Annual Report which outlines the implementation work.

Relevant scrutiny committee consulted:

YES (Policy & Resources Scrutiny on 6 December 2017)

Exec Board Decision Required	YES
Council Decision Required	NO

**EXECUTIVE BOARD MEMBER PORTFOLIO HOLDER:-** Cllr. Peter Hughes Griffiths

Directorate	Regeneration & Policy	Tel Nos / E Mail
Name of Head of Service:	Designations:	Addresses:
Wendy Walters	Director	01267 224112
Report Author:	Policy & Partnership Officer	<a href="mailto:WSWalters@carmarthenshire.gov.uk">WSWalters@carmarthenshire.gov.uk</a>
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# EXECUTIVE SUMMARY

## EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

### ANNUAL REPORT 2016/17 ON THE WELSH LANGUAGE

#### 1. BRIEF SUMMARY OF PURPOSE OF REPORT.

This Annual Report has been produced in order to comply with the Welsh Language Commissioner's monitoring arrangements. The Welsh Language Commissioner gave Carmarthenshire County Council a compliance notice regarding the Welsh Language Standards Regulations on 30 September 2015 which required CCC to comply with most of the standards by 31 March 2016.

The Welsh Language (Wales) Measure 2011 places a duty on county councils and county borough councils in Wales, national park authorities and Welsh Ministers to comply with standards in relation to the Welsh language.

The Standards mean that the Welsh language must not be treated less favourably than the English language, and must also promote or facilitate the use of the Welsh language. This is in accordance with the two principles that form the basis of the Welsh Language Commissioner's work:

- in Wales, the Welsh language should be treated no less favourably than the English language
- persons in Wales should be able to live their lives through the medium of the Welsh language if they choose to do so.

This report provides the detail in relation to the individual Standards; however, it is proposed that the Report for 2017-18 will be streamlined to report on the group of Standards rather than the individual areas.

#### 2. OTHER OPTIONS AVAILABLE AND THEIR PROS AND CONS

Preparing an Annual Report is set as a specific Standard (158).

DETAILED REPORT ATTACHED?

YES  
Annual Report 2016-17

## IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report :

Signed: **WS Walters**

Director of Regeneration and Policy

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
<b>YES</b>	<b>YES</b>	<b>NONE</b>	<b>NONE</b>	<b>NONE</b>	<b>NONE</b>	<b>NONE</b>

### 1. Policy, Crime & Disorder and Equalities

The Compliance Notice received from the Welsh Language Commissioner on 30 September 2015 required the Authority to comply with a new set of Standards by 31 March 2016.

### 2. Legal

The Welsh Language Standards Regulations 2015 came into force on 31 March 2015. These Regulations replace the responsibilities placed on Carmarthenshire County Council under the Welsh Language Act 1993 and were imposed on the Authority on 31 March 2016.

## CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: **WS Walters**

Director of Regeneration and Policy

### 1. Scrutiny Committee - 6 December 2017

2. Local Member(s) - n/a

3. Community / Town Council - n/a

4. Relevant Partners - n/a

5. Staff Side Representatives and other Organisations - n/a

### Section 100D Local Government Act, 1972 – Access to Information

List of Background Papers used in the preparation of this report:

Title of Document	File Ref No.	Locations that the papers are available for public inspection
Welsh Language (Wales) Measure 2011		(Welsh version) <a href="http://www.legislation.gov.uk/mwa/2011/1/pdfs/mwa_20110001_w_e.pdf">http://www.legislation.gov.uk/mwa/2011/1/pdfs/mwa_20110001_w_e.pdf</a> (English version) <a href="http://www.legislation.gov.uk/mwa/2011/1/pdfs/mwa_20110001_e_n.pdf">http://www.legislation.gov.uk/mwa/2011/1/pdfs/mwa_20110001_e_n.pdf</a>
Carmarthenshire County Council's Welsh Language Standards – Compliance Notice		(Welsh version) <a href="http://www.sirgar.llyw.cymru/media/1885671/20170321-hysbysiad-cydymffurfio44-cyngor-sir-g%C3%A2r-cy-.pdf">http://www.sirgar.llyw.cymru/media/1885671/20170321-hysbysiad-cydymffurfio44-cyngor-sir-g%C3%A2r-cy-.pdf</a> (English version) <a href="http://www.carmarthenshire.gov.wales/media/1885670/20170321-hysbysiad-cydymffurfio44-cyngor-sir-g%C3%A2r-en-.pdf">http://www.carmarthenshire.gov.wales/media/1885670/20170321-hysbysiad-cydymffurfio44-cyngor-sir-g%C3%A2r-en-.pdf</a>

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# Carmarthenshire County Council's Annual Report 2016/17 on the Welsh language

Dear Commissioner,

Please see enclosed Carmarthenshire County Council's Annual Report for 2016/17. The report focuses on the first year of implementation of the Welsh Language Standards. The report follows the same format as last year's preparatory report – with evidence of progress against action points for every Standard. However, it is likely that the annual report hereafter, will follow a slightly different format with Standards being grouped into categories, as a lot of the work to comply with the Standards will continue and will not need to be repeated.

During 2016/17, the Welsh Language Members' Advisory Panel has continued to receive regular updates regarding the Standards, and have continued with their key role of monitoring progress and calls for evidence of progress from specific departments within the Council.

The County Forum, which is being led by the Council and includes representation from organisations who promote the Welsh language in the county, as well as public bodies with Welsh language officers, has continued with its role of developing a programme of promoting the Welsh language in the county and has contributed significantly to creating the Promotion Strategy for Carmarthenshire, in accordance with the Promotion Standard.

When writing the 2015/16 report, the recommendations of 'The Welsh Language in Carmarthenshire' report were allocated to the *Internal Use Policy, Standards Action Plan, the Promotion Strategy* and the *Welsh in Education Strategic Plan*, but during the process of writing the Promotion Strategy, it came apparent that the action plan for the Strategy would be the ideal location for the recommendations (apart from those relevant to education). We will therefore report on *The Welsh Language in Carmarthenshire* recommendations in the Action plan report of the Promotion Strategy and they will not appear as an appendix to this report.

A lot of internal communication work has been undertaken during 2016-17 whilst building on the work of creating guidelines to convey the standards during the preparatory year. All guidelines were placed on the intranet and a new guideline was created which helps staff to write in Welsh by using electronic support (see Appendix 1). As you can see from the Communication Plan for 2016-17 (see Appendix 2), a number of internal road shows were attended to disseminate messages and to distribute guidelines, and in October a managers' conference was attended. A presentations were given to various groups of staff and a lot of communication work was undertaken through collective electronic media as well as the electronic newsletter and the electronic newsletter sent with pay slips. Furthermore, additional support materials were created to sit alongside and support the Guidelines, including audio clips, vocabularies, videos and templates (Appendix 3). Posters were designed and printed to display in the Council's print rooms to remind staff to work bilingually (Appendix 4).

The Council have also been busy communicating with the public. The campaign that was ran last year in 'Carmarthenshire News' was published again this year, including an advert for learners to use their Welsh language with the Council (Appendix 4). The campaign was also extended to bus stops (Appendix 2). Six areas were chosen to display posters in those communities which are priority areas for the County Strategic Forum. Following publishing the Promotion Strategy, a banner was used on the corporate website homepage to draw the public's attention to it (Appendix 2).

Promotion work was undertaken with the County's Event Organiser Forum to convey the importance of using the Welsh language when organising community events and sharing information about the support available to work bilingually.

The county's markets attract a high number of local customers and visitors, and with many of them being indigenous businesses of the county, there is a golden opportunity to promote the Welsh language. The campaign 'Our produce, our language' started during the year, with posters being displayed by stall holders to encourage customers to speak Welsh. We hope to extend this campaign during 2017-18 to ensure that customers see and hear the language in our markets.

Another significant development that happened this year was the development of Carmarthenshire County Council's [Promotion Strategy](#). Although work had already taken place following the results of the last Census, the challenge set out by the Standards promotes a new focus to the work of promoting the Welsh language in the county. The Promotion Strategy was developed by the Welsh Language Members' Advisory Panel and the County Strategic Forum and all parties have agreed to work towards the vision of restoring the Welsh language as the main language in the county. The Strategy was approved by the Executive Board and was published on our website, and moreover work begun that derived from the Strategy through the County Forum. The need for a more complete picture of activity promoting the Welsh language was identified, and a piece of research work was commissioned. The document was circulated to partners of the County Forum and it will be a useful tool for the County Forum when planning work in the future. The document will be published on the website shortly. When writing the Promotion Strategy, the need to find more meaningful indicators for measuring the success of the Promotion Strategy was also identified. Initial work has been undertaken to find indicators that would measure the use of the Welsh language and awareness of the Welsh language, but there is still work to be done on this before it can be incorporated into action plans of the Promotion Strategy in the future.

When looking at raising awareness of the benefits of bilingualism as part of the work on the Promotion Strategy, work was undertaken on the need to create a pool of language awareness resources for the county, which would provide a consistent message that all organisations could convey. An electronic resource was prepared on Google drive and this has been shared with all organisations that promote the Welsh language in the county. In order to start raising awareness of the advantages of bilingualism in the county, a comprehensive booklet that promotes the advantages of Welsh medium education and specifies the path towards bilingualism, has been designed and printed (Appendix 5). This work derived from the County Forum and all partners contributed to the content of the booklet. During 2017-18, this booklet will be distributed strategically to support delivery of the Welsh in Education Strategic Plan.

Following the work done on data collection for the language skills audit, the potential to carry out intensive work to move staff along the language continuum was identified. A successful bid was made for funding to appoint a member of staff to work specifically on tailoring provision for individuals and to coordinate support between the Welsh for Adults provider and our staff. The officer will start in the next financial year and will be working within the Council's Learning and Development Team.

A safe recruitment training course is provided to any managers who are responsible for the Recruitment process, as well as Councillors who sit on appointment panels. During the year, we have worked with a Welsh medium training company in the county in order to support them to follow the recruitment training qualification, and therefore we will be able to promote Welsh medium opportunities internally. We will monitor the numbers that follow the course through the medium of Welsh in order to encourage more people to follow.

Development work took place during 2016-17 with Language Leaders in the Leisure Division. The Leaders met monthly and made constant progress with ensuring consistency in visual bilingualism within their workplaces through checklists. All permanent and temporary bilingual signage used by the Division were corrected and rectified, and saved in a convenient place for future use, and work was done to ensure that staff are informed of opportunities to learn Welsh. New language leaders were trained for the Environment Department and they will start on their work during the next financial year.

Promotional work was also accomplished that was additional and did not derive directly from the Promotion Strategy or the County Forum, however it did align with the Strategy's priorities of promoting businesses to use the Welsh language within the county and encourage learners to gain enough confidence to become fluent. An event was organised in Llanelli by the Business Development Team within the Regeneration Division to bring various businesses together to discuss the potential of working more bilingually and materials were distributed that included the Commissioner's guidelines, and the Council and Menter Iaith's resources. A new club for learners was organised, in partnership with Menter Gorllewin Sir Gâr, at Yr Atom in Carmarthen, in order to bring learners together so that they get the opportunity to hear and use the Welsh language informally (Appendix 2). A number of staff within the council were encouraged to attend. The numbers were extremely encouraging, and time must be invested in this club to ensure it continues in the future. It would be good to try to duplicate this in other areas during 2017-18.

During the year, the Policy and Partnership Team has worked closely with all Council departments to offer support and guidance but also to monitor compliance. One example is the work of the standards audit completed with the Senior Management Team within the Housing Division. A meeting was held with the Senior Managers to map out the standards, the level of compliance and to explore the opportunities for future developments. The results of the meeting were positive and the information was presented to the Head of Service with recommendations for action. One of the managers was appointed as a Language Leader and the division will follow the 'Language Leaders' training during 2017-18. One of the areas highlighted by the managers was that it is difficult to release staff for Welsh lessons in the workplace, as a large proportion of them provide frontline services. As a result, we have set up a specific course for the division in their main office at East Gate, and the course will also be provided in Carmarthen and Ammanford. The content is tailored to the service area.

Regular meetings have also continued with Human Resources colleagues in order to ensure progress in accordance with the Standards and to receive regular feedback regarding the implementation of the Language Skills Strategy. The Human Resources Division monitor the recruitment processes and support managers in conducting language assessments of posts. They are also responsible for the training provision and providing employment support to all council staff. We will continue to meet regularly during 2017-18.

The Communities Department has also appointed one of the senior management team as a Language Leader, in order to lead on the *More than just Words Strategic Framework* and to ensure progress is made when providing Welsh language services in care. During the year, the departmental forum has met regularly to discuss areas such as workforce planning, commissioning services and staff training. Following receiving the results of the language skills audit, a task and finish group was established to look at the results and to compare the number of clients receiving care through the medium of Welsh and the active offer. The results of this work will be presented to the Director of Communities and to the Health and Social Care Scrutiny Committee during 2017-18.

Below is a list of attachments which is evidence for the report -

Appendix 1: Guidelines Writing Welsh and your computer

Appendix 2: Communication Plan

Appendix 3: Intranet materials (e.g. chairing meetings)

Appendix 4: Posters for print rooms

Appendix 5: Leaflet promoting bilingualism

Appendix 6: Complaints received

Appendix 7: Training provided

Appendix 8: Results of the language skills audit

I sincerely hope that the report is evidence of the Council's commitment to realise the Standards. You are welcome to contact us if you have any enquiries after reading this report.

Regards,

Councillor Peter Hughes-Griffiths

**Executive Board Member with responsibility for the Welsh Language  
Carmarthenshire County Council**



**Class of Standard: Service Delivery**

Standard Number	Standard	Action Points 16-17	Status and evidence
1	If you receive correspondence from a person in Welsh you must reply in Welsh (if an answer is required), unless the person has indicated that there is no need to reply in Welsh.	<ul style="list-style-type: none"> <li>• Update information on induction e-module</li> <li>• Work with <i>Learning and Development</i> and <i>Optimwm</i></li> <li>• Work with the departmental Business Support units to raise awareness and monitor development</li> <li>• Ways of monitoring to be discussed by Internal working group</li> </ul>	<ul style="list-style-type: none"> <li>• General information regarding the Standards requirements have been included in the induction e-module and an elaboration of the Standards requirements have been included in the Language Awareness e-module</li> <li>• Develop the role of the Language Leaders to include monitoring and checking</li> <li>• The departments to continue to implement the Standards</li> </ul>
4	When you send the same correspondence to several persons, you must send a Welsh language version of the correspondence at the same time as you send any English language version.	<ul style="list-style-type: none"> <li>• See above</li> <li>• Cooperate with Communications unit to identify departments with newsletters to ensure that they are bilingual and to include content on Standards</li> </ul>	<ul style="list-style-type: none"> <li>• See above</li> <li>• Departmental newsletters have been checked</li> </ul>
5	If you don't know whether a person wishes to receive correspondence from you in Welsh, when you correspond with that person you must provide a Welsh language version of the correspondence.	Look at options in terms of entrance points for Language choice in order to ensure accurate records (in databases that were set up before the Standards)	<ul style="list-style-type: none"> <li>• Our advice to departments is to provide bilingual versions of correspondence. With the few examples where regular correspondence leads to the language being recorded, the</li> </ul>

			departments have systems in place.
6	If you produce a Welsh language version and a corresponding English language version of correspondence, you must not treat the Welsh language version less favourably than the English language version (for example, if the English version is signed, or if contact details are provided on the English version, then the Welsh version must be treated in the same way).	See above	
7	You must state - (a) in correspondence, and (a) in publications and official notices that invite persons to respond to you or to correspond with you, that you welcome receiving correspondence in Welsh, that you will respond to any correspondence in Welsh, and that corresponding in Welsh will not lead to delay.	<ul style="list-style-type: none"> <li>• Develop publishing guidelines</li> <li>• Distribute guideline according to the Communications Plan</li> <li>• Discuss with graphic designers to place statement as departments order new headed paper</li> </ul>	<ul style="list-style-type: none"> <li>• Completed</li> <li>• Completed</li> <li>• Completed</li> </ul>
8	When a person contacts you on your main telephone number (or numbers), or on any helpline numbers or call centre numbers, you must greet the person in Welsh.	<ul style="list-style-type: none"> <li>• Update information in the Module</li> <li>• Induction session – how to answer phone – update needed</li> <li>• Discuss <i>Optimwm</i> work with Learning and Development</li> <li>• Monitoring to be discussed in Working group</li> </ul>	<ul style="list-style-type: none"> <li>• See above</li> <li>• See above</li> <li>• Presentation to the Customer Services Department</li> <li>• A phonetic script was provided to employees in our libraries on how to greet in Welsh.</li> <li>• Additional resources were created including scripts</li> </ul>

			and sound clips for the intranet
9	When a person contacts you on your main telephone number (or numbers), or on any helpline numbers or call centre numbers, you must inform the person that a Welsh language service is available.	See above	See above
10	When a person contacts you on your main telephone number (or numbers), or on any helpline numbers or call centre numbers, you must deal with the call in Welsh in its entirety if that is the person's wish (where necessary by transferring the call to a member of staff who is able to deal with the call in Welsh).	See above <ul style="list-style-type: none"> <li>• Following the Skills assessment, update language skills record in email address book (outlook). Follow this up with IT Services</li> <li>• Keep an eye on Microsoft Office 365</li> </ul>	
12	When you advertise telephone numbers, helpline numbers or call centre services, you must not treat the Welsh language less favourably than the English language.	No action needed	
13	If you offer a Welsh language service on your main telephone number (or numbers), on any helpline numbers or call centre numbers, the telephone number for the Welsh language service must be the same as for the corresponding English language service.	No action needed	
14	When you publish your main telephone number or any helpline numbers or call centre service numbers, you must state (in Welsh) that you welcome calls in Welsh.	<ul style="list-style-type: none"> <li>• Run marketing campaign 'whichever way...' to promote Welsh medium services</li> <li>• Run a specific campaign in Carmarthenshire News to encourage people to use Welsh when getting in touch with the Council</li> </ul>	<ul style="list-style-type: none"> <li>• Completed</li> <li>• Marketing material to promote services provided by the Customer Centre has been checked to ensure compliance</li> </ul>

15	If you have performance indicators for dealing with telephone calls, you must ensure that those performance indicators do not treat telephone calls made in Welsh any less favourably than calls made in English.	Policy Team to speak to the Head of Customer Services about Standard 15	
16	Your main telephone call answering service (or services) must inform persons calling, in Welsh, that they can leave a message in Welsh.	Include in the Telephone Answering Guidelines	Completed
17	When there is no Welsh language service available on your main telephone number (or numbers), or any helpline numbers or call centre numbers, you must inform persons calling, in Welsh (by way of an automated message or otherwise), when a Welsh language service will be available.	No action needed	
18	If a person contacts one of your departments on a direct line telephone number (including on staff members' direct line numbers), and that person wishes to receive a service in Welsh, you must provide that service in Welsh in its entirety (if necessary by transferring the call to a member of staff who is able to deal with the call in Welsh).	<ul style="list-style-type: none"> <li>• Update Language Awareness e-module</li> <li>• Induction session – how to answer phone – update needed</li> <li>• Update language skills record on Outlook</li> </ul>	<ul style="list-style-type: none"> <li>• General information regarding the Standards requirements have been included in the induction e-module and an elaboration of the Standards requirements have been included in the Language Awareness e-module</li> </ul>

20	When a person contacts you on a direct line number (whether on a department's direct line number or on the direct line number of a member of staff), you must ensure that, when greeting the person, the Welsh language is not treated less favourably than the English language.	See above	
21	When you telephone an individual ("A") for the first time you must ask A whether A wishes to receive telephone calls from you in Welsh, and if A responds to say that A wishes to receive telephone calls in Welsh you must keep a record of that wish, and conduct telephone calls made to A from then onwards in Welsh.	See above	
22	Any automated telephone systems that you have must provide the complete automated service in Welsh.	See above	
24	If you invite one person only ("P") to a meeting you must ask P whether P wishes to use the Welsh language at the meeting, and inform P that you will, if necessary, provide a translation service from Welsh to English for that purpose.	<ul style="list-style-type: none"> <li>• Discuss with Working Group about monitoring this</li> <li>• Provide wording on intranet on inviting someone to a meeting</li> </ul>	<ul style="list-style-type: none"> <li>• Additional resources were created that provides a wording for inviting persons to a meeting. They have been placed on the intranet.</li> </ul>

24A	If you have invited one person only ("P") to a meeting and P has informed you that P wishes to use the Welsh language at the meeting, you must arrange for a simultaneous translation service from Welsh to English to be available at the meeting (unless you conduct the meeting in Welsh without the assistance of a translation service).	Develop Guideline on Organising and arranging meetings	Completed
26	If you invite an individual ("A") to a meeting, and the meeting relates to the well-being of A, you must ask A whether A wishes to use the Welsh language at the meeting, and inform A that you will, if necessary, provide a translation service from Welsh to English and from English to Welsh for that purpose.	<ul style="list-style-type: none"> <li>• Send Standard to department who come under the definition of wellbeing – Social Care, Children’s Services</li> <li>• Discuss translating from English to Welsh with Communications department</li> </ul>	Completed
26A	<p>You must arrange for a simultaneous translation service from Welsh to English and from English to Welsh to be available at a meeting -</p> <p>(a) if the meeting relates to the well-being of an invited individual ("A"), and</p> <p>(b) if A has informed you that A wishes to use the Welsh language at the meeting; unless you conduct the meeting in Welsh without the assistance of a translation service.</p>	<ul style="list-style-type: none"> <li>• Send Standard to department who come under the definition of wellbeing – Social Care, Children’s Services</li> <li>• Discuss with Communities Manager</li> <li>• Discuss with Manager responsible for Wellbeing Act and Information, Advice and Support Manager</li> </ul>	Completed
27	If you invite more than one person to a meeting (which does not relate to the well-being of one or more of the individuals invited), you must ask	Consider best ways of monitoring	

	each person whether they wish to use the Welsh language at the meeting.		
27A	If you have invited more than one person to a meeting (which does not relate to the well-being of one or more of the individuals invited), and at least 10% (but less than 100%) of the persons invited have informed you that they wish to use the Welsh language at the meeting, you must arrange for a simultaneous translation service from Welsh to English to be available at the meeting.	Consider best ways of monitoring	Staff working group meeting, June
27CH	If you have invited more than one person to a meeting (which does not relate to the well-being of one or more of the individuals invited), and all of the persons invited have informed you that they wish to use the Welsh language at the meeting, you must conduct the meeting in Welsh (without the assistance of a simultaneous or consecutive translation service).	<ul style="list-style-type: none"> <li>Follow the Challenge and Appeal procedure through the Commissioner's Office</li> <li>Following the result, inform staff through Y Gair and Egair</li> </ul>	Following challenging the standard, the Commissioner determined the requirement for the Council to comply with the standard to be unreasonable or disproportionate at present. Standard 27CH has been replaced with 27D.
27D	If you have invited more than one person to a meeting (which does not relate to the well-being of one or more of the individuals invited), and all of the persons invited have informed you that they wish to use the Welsh language at the meeting, you must arrange for a simultaneous translation service from Welsh to English to be available at the meeting (unless you conduct the meeting in Welsh without the assistance of a translation service).		The final compliance notice was received from the Commissioner which included standard 27D instead of standard 27CH after challenging the standard.

28	<p>If you invite more than one person to a meeting, and that meeting relates to the well-being of one or more of the individuals invited, you must -</p> <p>(a) ask that individual or each of those individuals whether he or she wishes for the meeting to be conducted in Welsh, and</p> <p>(b) if that individual, or if each of those individuals, informs you that he or she wishes for the meeting to be conducted in Welsh, conduct the meeting in Welsh (without the assistance of a simultaneous or consecutive translation service).</p>	<ul style="list-style-type: none"> <li>Follow the Challenge and Appeal procedure through the Commissioner's Office</li> <li>Following the result, inform staff through Y Gair and Egair</li> </ul>	<p>Following challenging the standard, the Commissioner determined the requirement for the Council to comply with the standard to be unreasonable or disproportionate at present. Standard 28 has been replaced with 29 and 29A.</p>
29	<p>If you invite more than one person to a meeting, and that meeting relates to the well-being of one or more of the individuals invited, you must - (a) ask that individual or each of those individuals whether he or she wishes to use the Welsh language at the meeting, and (b) inform that individual (or those individuals) that, if necessary, you will provide a translation service from Welsh to English and from English to Welsh for that purpose.</p>		<p>The final compliance notice was received from the Commissioner which included standard 29 instead of standard 28 after challenging the standard.</p>
29A	<p>You must provide a simultaneous translation service from Welsh to English and from English to Welsh at a meeting - (a) if you have invited more than one person to the meeting, (b) if the meeting relates to the well-being of one or more of the individuals invited, and (c) if at least one of those</p>		<p>The final compliance notice was received from the Commissioner which included standard 29A instead of standard 28 after challenging the standard.</p>



	individuals has informed you that he or she wishes to use the Welsh language at the meeting; unless you conduct the meeting in Welsh without the assistance of a translation service.		
30	If you arrange a meeting that is open to the public you must state on any material advertising it, and on any invitation to it, that anyone attending is welcome to use the Welsh language at the meeting.	<ul style="list-style-type: none"> <li>• Monitoring work to be confirmed</li> <li>• Remind staff through the Communications Plan</li> </ul>	Guidelines have been sent and included on the intranet for staff to use
31	When you send invitations to a meeting that you arrange which is open to the public, you must send the invitations in Welsh.	<ul style="list-style-type: none"> <li>• Monitoring work to be confirmed</li> <li>• Remind staff through the Communications Plan</li> <li>• Include wording on intranet templates</li> </ul>	<p>Guidelines have been sent and included on the intranet for staff to use</p> <p>An e-mail template of arranging a meeting was created</p>
32	<p>If you invite persons to speak at a meeting that you arrange which is open to the public you must -</p> <p>(a) ask each person invited to speak whether he or she wishes to use the Welsh language, and</p> <p>(b)if that person (or at least one of those persons) has informed you that he or she wishes to use the Welsh language at the meeting, provide a simultaneous translation service from Welsh to English for that purpose (unless you conduct the meeting in Welsh without a translation service).</p>	<ul style="list-style-type: none"> <li>• Monitoring work to be confirmed</li> <li>• Remind staff through the Communications Plan</li> <li>• Include wording on intranet templates</li> </ul>	Guidelines have been sent and included on the intranet for staff to use

33	<p>If you arrange a meeting that is open to the public, you must ensure that a simultaneous translation service from Welsh to English is available at the meeting, and you must orally inform those present in Welsh -</p> <p>(a) that they are welcome to use the Welsh language, and</p> <p>(b) that a simultaneous translation service is available.</p>	<ul style="list-style-type: none"> <li>• Remind staff through Communications Plan</li> <li>• Include wording on intranet templates</li> </ul>	Guidelines have been sent and included on the intranet for staff to use
34	<p>If you display any written material at a meeting that you arrange which is open to the public, you must ensure that that material is displayed in Welsh, and you must not treat any Welsh language text less favourably than the English language text.</p>	<ul style="list-style-type: none"> <li>• Remind staff through Communications Plan</li> <li>• Include wording on intranet templates</li> </ul>	See above
35	<p>If you organise a public event, or fund at least 50% of a public event, you must ensure that, in promoting the event, the Welsh language is treated no less favourably than the English language (for example, in the way the event is advertised or publicised).</p>	<ul style="list-style-type: none"> <li>• Create and promote a leaflet on Guidelines for Holding Public Events</li> <li>• Create Guideline on Procurement and Distributing grants</li> <li>• Develop guidelines for organisations receiving grants</li> </ul>	<p>Completed</p> <p>An information meeting held by the Commissioner and Eversheds legal company was attended to receive information regarding procurement. The Commissioner's Procurement Guideline has been distributed within the Council.</p> <p>A grant panel for events has been established and sets linguistic requirements.</p>

			A conference for Event Organisers was held in the county and information regarding promoting the Welsh language.
36	If you organise a public event, or fund at least 50% of a public event, you must ensure that the Welsh language is treated no less favourably than the English language at the event (for example, in relation to services offered to persons attending the event, in relation to signs displayed at the event and in relation to audio announcements made at the event).	<ul style="list-style-type: none"> <li>• Create and promote a leaflet on Guidelines for Holding Public Events</li> <li>• Develop guidelines for organisations receiving grants</li> </ul>	<p>Completed</p> <p>A grant panel for events has been established and sets linguistic requirements.</p> <p>A conference for Event Organisers was held in the county and information regarding promoting the Welsh language.</p>
37	Any publicity or advertising material that you produce must be produced in Welsh, and if you produce the advertising material in Welsh and in English, you must not treat the Welsh language version less favourably than you treat the English language version.	<ul style="list-style-type: none"> <li>• Discuss with Marketing &amp; Media the contents of a Design and Publishing guideline including information on what needs to be published bilingually and how best to do this</li> <li>• Discuss possibility of including information in Council's Brand Guidelines</li> <li>• Make a poster to display in Council's printing rooms</li> <li>• Contact IT for a list of all printer locations</li> </ul>	<p>Work was completed with the Communication Team to create a bilingual Design and Publish Guideline</p> <p>Posters were created to display next to all Council printers</p>

38	Any material that you display in public must be displayed in Welsh, and you must not treat any Welsh language version of the material less favourably than the English language version.	Create and promote a leaflet on Guidelines for Holding Public Events	Completed
41	<p>If you produce the following documents you must produce them in Welsh -</p> <p>(a) agendas, minutes and other papers that are available to the public, which relate to management board or cabinet meetings;</p> <p>(b) agendas, minutes and other papers for meetings, conferences or seminars that are open to the public.</p> <p><b>You must comply with standard 41(a) in every circumstance, except:</b></p> <p><input type="checkbox"/> <b>other papers that are available to the public, which relate to management board or cabinet meetings.</b></p> <p><b>You must comply with standard 41(b) in every circumstance, except:</b></p> <p><input type="checkbox"/> <b>other papers for meetings that are open to the public.</b></p>	Conduct a checking exercise following the Advisory Panel meeting	Constant monitoring through the Democratic Services Unit
42	Any licence or certificate you produce must be produced in Welsh.	Develop a Design and Publishing Guideline	Completed
43	Any brochure, leaflet, pamphlet or card that you produce in order to provide information to the public must be produced in Welsh.	Develop a Design and Publishing Guideline	Completed

44	<p>If you produce the following documents, and they are available to the public, you must produce them in Welsh -</p> <p>(a) policies, strategies, annual reports and corporate plans;</p> <p>(b) guidelines and codes of practice;</p> <p>(c) consultation papers.</p>	Develop Design and Publishing Guideline	Completed
45	Any rules that you publish that apply to the public must be published in Welsh.	<ul style="list-style-type: none"> <li>• Develop Design and Publishing Guideline</li> <li>• Monitor published materials</li> </ul>	Completed
46	When you issue any statement to the press you must issue it in Welsh and, if there is a Welsh language version and an English language version of a statement, you must issue both versions at the same time.	<ul style="list-style-type: none"> <li>• Monitor news page content</li> <li>• Contact Marketing &amp; Media Manager</li> </ul>	Completed
47	<p>If you produce a document for public use, and no other standard has required you to produce the document in Welsh, you must produce it in Welsh -</p> <p>(a) if the subject matter of the document suggests that it should be produced in Welsh, or</p> <p>(b) if the anticipated audience, and their expectations, suggests that the document should be produced in Welsh.</p>	Develop Design and Publishing Guideline	Completed

48	If you produce a document in Welsh and in English (whether separate versions or not), you must not treat any Welsh language version less favourably than you treat the English language version.	Develop Design and Publishing Guideline	Completed
49	If you produce a Welsh language version and a separate English language version of a document, you must ensure that the English language version clearly states that the document is also available in Welsh.	<ul style="list-style-type: none"> <li>• Develop Design and Publishing Guideline</li> <li>• Include wording in Guideline</li> <li>• Include wording in Correspondence Guideline</li> </ul>	Completed
50	Any form that you produce for public use must be produced in Welsh.	Include in the leaflet on a Design and Publishing Guideline	Completed
50A	If you produce a Welsh language version and a separate English language version of a form, you must ensure that the English language version clearly states that the form is also available in Welsh.	Include in the Design and Publishing Guideline	Completed
50B	If you produce a form in Welsh and in English (whether separate versions or not), you must ensure that the Welsh language version is treated no less favourably than the English language version, and you must not differentiate between the Welsh and English versions in relation to any requirements that are relevant to the form (for example in relation to any deadline for submitting the form, or in relation to the time allowed to respond to the content of the form).	Include in the Design and Publishing Guideline	Completed

51	If you pre-enter information on a Welsh language version of a form (for example, before sending it to a member of the public in order for him or her to check the content or to fill in the remainder of the form), you must ensure that the information that you pre-enter is in Welsh.	Include in the Design and Publishing Guideline	Completed
52	You must ensure that - (a) the text of each page of your website is available in Welsh, (b) every Welsh language page on your website is fully functional, and (c) the Welsh language is not treated less favourably than the English language on your website.	<ul style="list-style-type: none"> <li>• Cooperate with Media &amp; Marketing team to monitor website content</li> <li>• Remind staff through Umbraco training</li> </ul>	In operation
55	If you have a Welsh language web page that corresponds to an English language web page, you must state clearly on the English language web page that the page is also available in Welsh, and you must provide a direct link to the Welsh page on the corresponding English page.	<ul style="list-style-type: none"> <li>• Communicate Standards 52-59 to the individual departments</li> <li>• Ensure that the website and updates are available in Welsh</li> <li>• Draft a leaflet on a Guideline for Technology and the Welsh Language</li> </ul>	Completed
56	You must provide the interface and menus on every page of your website in Welsh.	Draft a leaflet on a Guideline for Technology and the Welsh Language	Completed
57	All apps that you publish must function fully in Welsh, and the Welsh language must be treated no less favourably than the English language in relation to that app.	Draft a leaflet on a Guideline for Technology and the Welsh Language	The Standards have been included in the policy 'Using Social Media'.

58	When you use social media you must not treat the Welsh language less favourably than the English language.	<ul style="list-style-type: none"> <li>• Draft a leaflet on a Guideline for Technology and the Welsh Language</li> <li>• Ensure that the Media &amp; Marketing team include Standards 57 and 58 in use of Social Media policy</li> </ul>	The Standards have been included in the policy 'Using Social Media'.
59	If a person contacts you by social media in Welsh, you must reply in Welsh (if an answer is required).	Draft a leaflet on a Guideline for Technology and the Welsh Language	The Standards have been included in the policy 'Using Social Media'
60	You must ensure that any self-service machines that you have function fully in Welsh, and the Welsh language must be treated no less favourably than the English language in relation to that machine.	<ul style="list-style-type: none"> <li>• Identify depts. Who use Self-service machines (Leisure, HWB) – discuss with Staff Working group</li> <li>• Include in Procurement and Commissioning guideline</li> </ul>	Completed  It was decided not to create this guideline as the Commissioner has published a similar document.
61	When you erect a new sign or renew a sign (including temporary signs), any text displayed on the sign must be displayed in Welsh (whether on the same sign as you display corresponding English language text or on a separate sign); and if the same text is displayed in Welsh and in English, you must not treat the Welsh language text less favourably than the English language text.	<ul style="list-style-type: none"> <li>• Draft a Leaflet on Guidelines for Design and Publishing</li> <li>• Include in Egair/Y gair</li> </ul>	Completed  Completed  A check list template was created and provided for customer services staff and language leaders of the leisure and culture department to check signs and posters.
62	When you erect a new sign or renew a sign (including temporary signs) which conveys the	<ul style="list-style-type: none"> <li>• Include in the Design and Publishing Guideline</li> </ul>	Completed



	same information in Welsh and in English, the Welsh language text must be positioned so that it is likely to be read first.	<ul style="list-style-type: none"> <li>• Check arrangements for sign procurement – exercise through staff working group</li> </ul>	Have drawn the attention of staff to the standard in the staff newsletter. The Council is looking at the role of the staff working group.
63	You must ensure that the Welsh language text on signs is accurate in terms of meaning and expression.	Include in the Design and Publishing Guideline	Completed
64	Any reception service you make available in English must also be available in Welsh, and any person who requires a Welsh language reception service must not be treated less favourably than a person who requires an English language reception service.	<ul style="list-style-type: none"> <li>• Draft spreadsheet of Reception Areas and disseminate information to staff</li> <li>• Communicate the Standard to the Head of Customer Services</li> </ul>	<p>Staff at the Customer Services Centre have received a presentation regarding the standards to ensure they are aware and to discuss any issues.</p> <p>Completed</p> <p>Training was provided by the company 'Sglein' on providing bilingual customer services to two groups of leisure staff and at the department's annual staff conference.</p> <p>Working Welsh resources was distributed at the staff roadshows.</p>
67	You must display a sign in your reception which states (in Welsh) that persons are welcome to use the Welsh language at the reception.	<ul style="list-style-type: none"> <li>• See Standard 64</li> <li>• Draft email to all staff to communicate Standard, without forgetting public announcements, Standard 87</li> </ul>	<p>Completed</p> <p>'You are welcome to speak Welsh' signs have been created to display in receptions.</p>

		<ul style="list-style-type: none"> <li>• Distribute the above in Leisure Conference and to Language leaders</li> <li>• Distribute Working Welsh materials following above email</li> </ul>	
68	You must ensure that staff at the reception who are able to provide a Welsh language reception service wear a badge to convey that	<ul style="list-style-type: none"> <li>• Policy team to correspond with Marketing &amp; Media Manager</li> <li>• See above</li> </ul>	Completed
69	Any official notice that you publish or display must be published or displayed in Welsh, and you must not treat any Welsh language version of a notice less favourably than an English language version.	<ul style="list-style-type: none"> <li>• Include in the Design and Publishing Guideline</li> <li>• See 61</li> </ul>	Completed
70	When you publish or display an official notice that contains Welsh language text as well as English language text, the Welsh language text must be positioned so that it is likely to be read first.	Include in the Design and Publishing Guideline	Completed
71	Any documents that you publish which relate to applications for a grant, must be published in Welsh, and you must not treat a Welsh language version of such documents less favourably than an English language version.	<ul style="list-style-type: none"> <li>• Develop Procurement and Commissioning guideline</li> <li>• Arrange meeting with Manager of West Wales European Centre to relay third sector requirements</li> </ul>	It was decided not to create this guidance as the Commissioner has published a similar document.

72	When you invite applications for a grant, you must state in the invitation that applications may be submitted in Welsh and that any application submitted in Welsh will be treated no less favourably than an application submitted in English.	Develop Procurement and Commissioning guideline	It was decided not to create this guidance as the Commissioner has published a similar document.
72A	You must not treat applications for a grant submitted in Welsh less favourably than applications submitted in English (including, amongst other matters, in relation to the closing date for receiving applications and in relation to the time-scale for informing applicants of decisions).	See above	It was decided not to create this guidance as the Commissioner has published a similar document.
73	If you receive an application for a grant in Welsh and it is necessary to interview an applicant as part of your assessment of the application, you must offer to conduct that interview in Welsh and, if the applicant so wishes, you must conduct the interview in Welsh (without the assistance of a simultaneous or consecutive translation service).		Following challenging the standard, the Commissioner determined the requirement for the Council to comply with the standard to be unreasonable or disproportionate at present. Standard 73 has been replaced with 74.
74	If you receive an application for a grant in Welsh and it is necessary to interview the applicant as part of your assessment of the application you must - (a) offer to provide a translation service from Welsh to English to enable the applicant to use the Welsh		The final compliance notice was received from the Commissioner which included standard 74 instead of standard 73 after challenging the standard.

	language at the interview, and (b) if the applicant wishes to use the Welsh language at the interview, provide a simultaneous translation service for that purpose (unless you conduct the interview in Welsh without a translation service).		
75	When you inform an applicant of your decision in relation to an application for a grant, you must do so in Welsh if the application was submitted in Welsh.	<ul style="list-style-type: none"> <li>Develop Procurement and Commissioning guideline</li> </ul>	It was decided not to create this guidance as the Commissioner has published a similar document.
77	When you publish invitations to tender for a contract, you must state in the invitation that tenders may be submitted in Welsh, and that a tender submitted in Welsh will be treated no less favourably than a tender submitted in English.	<ul style="list-style-type: none"> <li>Contact Commissioning team within Social Services to attend team meeting</li> <li>Develop Procurement and Commissioning guideline</li> </ul>	<p>Team meeting attended.</p> <p>It was decided not to create this guidance as the Commissioner has published a similar document.</p>
77A	You must not treat a tender for a contract submitted in Welsh less favourably than a tender submitted in English (including, amongst other matters, in relation to the closing date for receiving tenders, and in relation to the time-scale for informing tenderers of decisions).	<ul style="list-style-type: none"> <li>Develop Procurement and Commissioning guideline</li> </ul>	It was decided not to create this guidance as the Commissioner has published a similar document.
79	If you receive a tender in Welsh and it is necessary to interview the tenderer as part of your assessment of the tender you must - (a) offer to provide a translation service from Welsh to English to enable the tenderer to use the Welsh language at the interview, and if the	<ul style="list-style-type: none"> <li>Develop Procurement and Commissioning guideline</li> </ul>	It was decided not to create this guidance as the Commissioner has published a similar document.

	tenderer wishes to use the Welsh language at the interview, provide a simultaneous translation service for that purpose (unless you conduct the interview in Welsh without a translation service).		
80	When you inform a tenderer of your decision in relation to a tender, you must do so in Welsh if the tender was submitted in Welsh.	See above	It was decided not to create this guidance as the Commissioner has published a similar document.
81	You must promote any Welsh language service that you provide, and advertise that service in Welsh.	<ul style="list-style-type: none"> <li>• Continue to identify joint opportunities with the Marketing Unit to promote the Council's Welsh language services during the year, e.g. Carmarthenshire Radio, Council websites, <ul style="list-style-type: none"> <li>- Bus stops</li> <li>- Carmarthenshire News</li> <li>- Markets</li> </ul> </li> </ul> <p>Consider County forum's role through Promotion Strategy</p>	<p>Campaigns were held to promote the council's Welsh language services</p> <ul style="list-style-type: none"> <li>• Bus stops (see attachment 2)</li> <li>• Carmarthenshire News</li> <li>• Market 'Our produce, Our Language' campaign</li> </ul> <p>An initial discussion was had as part of writing the Strategy but more attention will be needed in 2017/18.</p>
82	If you provide a service in Welsh that corresponds to a service you provide in English, any publicity or document that you produce, or website that you publish, which refers to the English service must also state that a corresponding service is available in Welsh.	Create a leaflet on Design and Publication Guidelines	Completed

83	When you form, revise or present your corporate identity, you must not treat the Welsh language less favourably than the English language.	<ul style="list-style-type: none"> <li>• Create a leaflet on Design and Publication Guidelines</li> <li>• Include information in Corporate Brand Guidelines</li> </ul>	Completed
84	<p>If you offer an education course that is open to the public, you must offer it in Welsh.</p> <p><b>You must comply with standard 84 in every circumstance, except:</b></p> <ul style="list-style-type: none"> <li>○ <b>when an assessment carried out in accordance with standard 86 comes to the conclusion that there is no need for that course to be offered in Welsh.</b></li> </ul>	<ul style="list-style-type: none"> <li>• Discuss internally and draft criteria that will assist in the needs assessments for Welsh medium courses</li> <li>• Organise workshop with staff who run courses regularly to discuss criteria</li> <li>• Run a specific project with the unit that organises training for school governors</li> <li>• Create database of bilingual trainers</li> </ul>	<p>Work with Balanceability companies to provide training for trainers by using translation equipment</p> <p>Work with the Housing department to provide Welsh medium or bilingual landlord training</p> <p>Education department has conducted a language skills audit of school Governors</p>
86	If you develop an education course that is to be offered to the public, you must assess the need for that course to be offered in Welsh; and you must ensure that the assessment is published on your website.	<ul style="list-style-type: none"> <li>• See 84</li> <li>• Draw attention to the need for assessments on the council website.</li> <li>• Discuss with Communications dept. location for these assessments on Welsh Web pages. Discuss branding of content</li> </ul>	Education department has conducted a language skills audit of school Governors

87	When you announce a message over a public address system, you must make that announcement in Welsh and, if the announcement is made in Welsh and in English, the announcement must be made in Welsh first.	<ul style="list-style-type: none"> <li>• Draw attention of Language Leaders following the training</li> <li>• See 67</li> </ul>	Completed
155	<p>You must ensure that a document which records the service delivery standards with which you are under a duty to comply, and the extent to which you are under a duty to comply with those standards, is available -</p> <p>(a) on your website, and</p> <p>(b) in each of your offices that are open to the public.</p>	<ul style="list-style-type: none"> <li>• Publish Standard document on website</li> <li>• Contact Customer Services manager to explain where document can be found</li> </ul>	<p>Completed</p> <p>(b) A presentation was made to the Customer Services Team regarding the standards which included referring staff to the documents on the website. A link was sent to staff following the meeting to assist with this.</p>
156	<p>You must -</p> <p>(a) ensure that you have a complaints procedure that deals with the following matters -</p> <p>(i) how you intend to deal with complaints relating to your compliance with the service delivery standards with which you are under a duty to comply, and</p> <p>(ii) how you will provide training for your staff in relation to dealing with those complaints,</p> <p>(b) publish a document that records that procedure on your website, and</p>	<ul style="list-style-type: none"> <li>• Meeting with AM</li> <li>• Discuss internally reviewing the steps of complaints procedure to ensure answerability</li> <li>• Check links on corporate website</li> </ul>	Completed

	(c) ensure that a copy of that document is available in each of your offices that are open to the public.		
157	<p>You must ensure that</p> <p>(a) you have arrangements for</p> <p>(a) overseeing the way you comply with the service delivery standards with which you are under a duty to comply,</p> <p>(b) promoting the services that you offer in accordance with those standards, and</p> <p>(c) facilitating the use of those services,</p> <p>(a) publish a document that records those arrangements on your website, and</p> <p>(b) ensure that a copy of that document is available in each of your offices that are open to the public.</p>	Internal discussions on how to report to the Commissioner and include the promotional, facilitation and supervisory elements in the action plan / annual report.	A format for the annual action plan was agreed upon as well as including elements of promoting, facilitating and monitoring.
158	<p>(1) You must produce a report (an "annual report"), in Welsh, in relation to each financial year, which deals with the way in which you have complied with the service delivery standards with which you were under a duty to comply during that year.</p> <p>(2) The annual report must include the number of complaints that you received during that year which related to your compliance with the service delivery standards with which you were under a duty to comply.</p> <p>(3) You must publish the annual report no later than 30 June following the financial year to</p>	Internal discussions (Staff Working Group) on how to report to the Commissioner and include the promotional, facilitation and supervisory elements in the action plan / annual report.	A format to report was agreed upon as well as including elements of promoting, facilitating and monitoring which was the annual report.



	<p>which the report relates.</p> <p>(4) You must publicise the fact that you have published an annual report.</p> <p>(5) You must ensure that a current copy of your annual report is available -</p> <p>(a) on your website, and</p> <p>(b) in each of your offices that are open to the public.</p>		
159	You must publish a document on your website which explains how you intend to comply with the service delivery standards with which you are under a duty to comply.	Publish Action Plan	Completed
160	You must provide any information requested by the Welsh Language Commissioner which relates to your compliance with the service delivery standards with which you are under a duty to comply.	Act responsively to the Commissioner's enquiries	Information was provided to the Commissioner as requested. Swimming Lessons Investigation Research report by Cwmni Iaitn on behalf on the Commissioner about promoting services.

## Class of Standard: Policy Making

Standard Number	Standard	Action Points 16-17	Status and evidence
88	<p>When you formulate a new policy, or review or revise an existing policy, you must consider what effects, if any (whether positive or adverse), the policy decision would have on -</p> <p>(a) opportunities for persons to use the Welsh language, and</p> <p>(b) treating the Welsh language no less favourably than the English language.</p>	<ul style="list-style-type: none"> <li>• Internal discussions on the need to draw up specialist guidelines on the impact of policies on the Welsh language.</li> <li>• Consider possibility of creating a guideline with Ceredigion and Gwynedd</li> <li>• Include the Welsh language as part of the Wellbeing of Future Generations Act Impact Assessment process.</li> <li>• Further discussion on the need to have specialist advice on the effect of decisions or policies on the Welsh language</li> <li>• Meeting in March to discuss assessments on the effect on the Welsh language, equalities and wellbeing of future generations</li> </ul>	<p>An integrated impact assessment has been prepared and agreed that brings together the Wellbeing of Future Generations legislation, equalities, the Welsh language, the environmental act and the United Nations Convention on Children's Rights. The assessment includes specific questions regarding the Welsh language and the impact of any policy on the rights on Welsh language speakers to use the language and how we promote the Welsh language.</p> <p>An integrated assessment guideline has been created with a specific section for the Welsh language.</p> <p>A meeting has taken place with lead officers in the areas. Have received feedback on the draft assessment from the relevant officials.</p>

89	When you formulate a new policy, or review or revise an existing policy, you must consider how the policy could be formulated (or how an existing policy could be changed) so that the policy decision would have positive effects, or increased positive effects, on – a) opportunities for persons to use the Welsh language, and b) treating the Welsh language no less favourably than the English language.	See Standard 88	See above
90	When you formulate a new policy, or review or revise an existing policy, you must consider how the policy could be formulated (or how an existing policy could be changed) so that the policy decision would not have adverse effects, or so that it would have decreased adverse effects, on – a) opportunities for persons to use the Welsh language, and b) treating the Welsh language no less favourably than the English language.	See 88	See above
91	When you publish a consultation document which relates to a policy decision, the document must consider, and seek views on, the effects (whether positive or adverse) that the policy decision under consideration would have on - (a) opportunities for persons to use the Welsh language, and (b) treating the Welsh language no less favourably than the English language.	<ul style="list-style-type: none"> <li>Initial discussion with the Policy, Consultation &amp; Engagement Officer</li> </ul>	<p>Two questions have been included in all consultation documents / templates</p> <p>Ensure that the questions are included and communicated to everyone conducting consultations</p>

92	<p>When you publish a consultation document which relates to a policy decision the document must consider, and seek views on, how the policy under consideration could be formulated or revised so that it would have positive effects, or increased positive effects, on</p> <p>(a) opportunities for persons to use the Welsh language, and</p> <p>(b) treating the Welsh language no less favourably than the English language.</p>	See 91	
93	<p>When you publish a consultation document which relates to a policy decision the document must consider, and seek views on, how the policy under consideration could be formulated or revised so that it would not have adverse effects, or so that it would have decreased adverse effects, on -</p> <p>(a) opportunities for persons to use the Welsh language, and</p> <p>(b) b) treating the Welsh language no less favourably than the English language.</p>	See 91	
94	<p>You must produce and publish a policy on awarding grants (or, where appropriate, amend an existing policy) which requires you to take the</p>	<ul style="list-style-type: none"> <li>• Discuss internally how to measure impact</li> <li>• Discuss with other local authorities</li> </ul>	Work is continuing

	<p>following matters into account when you make decisions in relation to the awarding of a grant –</p> <p>(a) what effects, if any (and whether positive or negative), the awarding of a grant would have on</p> <p>(i) opportunities for persons to use the Welsh language, and</p> <p>(ii) treating the Welsh language no less favourably than the English language;</p> <p>(b) how the decision could be taken or implemented (for example, by imposing conditions of grant) so that it would have positive effects, or increased positive effects, on –</p> <p>(i) opportunities for persons to use the Welsh language, and</p> <p>(ii) treating the Welsh language no less favourably than the English language;</p> <p>(c) how the decision could be taken or implemented (for example, by imposing conditions of grant) so that it would not have adverse effects, or so that it would have decreased adverse effects on –</p> <p>(i) opportunities for persons to use the Welsh language, and</p> <p>(ii) treating the Welsh language no less favourably than the English language;</p> <p>(ch) whether you need to ask the applicant for any additional information in order to assist you in assessing the effects of awarding a grant on –</p>	<p>the possibility of developing a toolkit to measure impact of policies or decision on the Welsh language</p>	
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	(i)opportunities for persons to use the Welsh language, and (ii)treating the Welsh language no less favourably than the English language.		
95	When you commission or undertake research that is intended to assist you to make a policy decision, you must ensure that the research considers what effects, if any (and whether positive or adverse), the policy decision under consideration would have on -  (a) opportunities for persons to use the Welsh language, and (b) treating the Welsh language no less favourably than the English language.	Create Procurement, Commissioning and Grant Awarding Guidelines	It was decided not to create this guidance as the Commissioner has published a similar document.
96	When you commission or undertake research that is intended to assist you to make a policy decision, you must ensure that the research considers how the policy decision under consideration could be made so that it would have a positive effects, or so that it would have increased positive effects, on -  (a) opportunities for persons to use the Welsh language, and (b) treating the Welsh language no less favourably than the English language.	See 95	It was decided not to create this guidance as the Commissioner has published a similar document.

97	<p>When you commission or undertake research that is intended to assist you to make a policy decision, you must ensure that the research considers how the policy decision under consideration could be made so that it would not have adverse effects, or so that it would have decreased adverse effects, on -</p> <p>(a) opportunities for persons to use the Welsh language, and</p> <p>(b) treating the Welsh language no less favourably than the English language.</p>	See 95	It was decided not to create this guidance as the Commissioner has published a similar document.
161	<p>You must ensure that a document which records the policy making standards with which you are under a duty to comply, and the extent to which you are under a duty to comply with those standards, is available -</p> <p>(a) on your website, and</p> <p>(b) in each of your offices that are open to the public.</p>	<p>Publish the Standards document on the Council website.</p> <p>Contact Customer services department to ensure that staff are aware of its location on the website</p>	Completed
162	<p>You must -</p> <p>(a) ensure that you have a complaints procedure that deals with the following matters -how you intend to deal with complaints relating to your compliance with the policy making standards with which you are under a duty to comply, and</p> <p>(i) how you will provide training for your staff in relation to dealing with those complaints,</p>	Look at i-local website for comments	The Complaints procedure is available on the website

	<p>(b) publish a document that records that procedure on your website, and</p> <p>(c) ensure that a copy of that document is available in each of your offices that are open to the public.</p>		
163	<p>You must -</p> <p>(a) ensure that you have arrangements for overseeing the way you comply with the policy making standards with which you are under a duty to comply,</p> <p>(b) publish a document that records those arrangements on your website, and ensure that a copy of that document is available in each of your offices that are open to the public.</p>	Discuss internally how to report to Commissioner and include elements of promoting, facilitating and overseeing in the Action Plan/Annual report	A format for the annual action plan was agreed upon as well as including elements of promoting, facilitating and monitoring.
164	<p>(1) You must produce a report (an "annual report"), in Welsh, in relation to each financial year, which deals with the way in which you have complied with the policy making standards with which you were under a duty to comply during that year.</p> <p>(2) The annual report must include the number of complaints you received during the year which related to your compliance with the policy making standards with which you were under a duty to comply.</p> <p>(3) You must publish the annual report no later than 30 June following the financial year to which the report</p>	Internal discussions on how to report to the Commissioner and include the promotional, facilitation and supervisory elements in the action plan / annual report.	A format to report was agreed upon as well as including elements of promoting, facilitating and monitoring which was the annual report.



	<p>relates.</p> <p>(4) You must publicise the fact that you have published an annual report.</p> <p>(5) You must ensure that a current copy of your annual report is available -</p> <p>(a) on your website, and</p> <p>(b) in each of your offices that are open to the public.</p>		
165	You must publish a document on your website which explains how you intend to comply with the policy making standards with which you are under a duty to comply.	Publish the action plan on the internet	Completed
166	You must provide any information requested by the Welsh Language Commissioner which relates to compliance with the policy making standards with which you are under a duty to comply.	Act responsively to the Commissioner's enquiries.	

## Class of Standard: Operational

Standard Number	Standard	Action Points 16-17	Status and evidence
98	You must develop a policy on using Welsh internally for the purpose of promoting and facilitating the use of the language, and you must publish that policy on your intranet.	<ul style="list-style-type: none"> <li>• Discuss internally and give further consideration to developing a policy on using the Welsh language internally</li> <li>• Consider including Standards 99 – 144 in the policy on using the Welsh language internally.</li> <li>• Draft a policy to be presented to the Advisory Panel and the Staff Working Party</li> <li>• Senior officers to scrutinise the document internally</li> <li>• Corporate Management team</li> </ul>	A policy was published on using the Welsh language internally after being approved by the Executive Board of the County Council. Many elements of the internal use policy has been promoted but the policy itself hasn't been promoted.
99	When you offer a new post to an individual, you must ask that individual whether he or she wishes for the contract of employment or contract for services to be provided in Welsh; and if that is the individual's wish you must provide the contract in Welsh.	<ul style="list-style-type: none"> <li>• Ask the Human Resources Department for update on Standards 99-119 and 127-131, 136-140.</li> </ul>	Standard documentation is available bilingually.
100	You must – (a) ask each employee whether he or she wishes to receive any paper correspondence that relates to his or her employment, and which is addressed to him or her personally, in Welsh, and	See above	Standard documentation is available bilingually.

	(b) if an employee so wishes, provide any such correspondence to that employee in Welsh.		
101	You must ask each employee whether he or she wishes to receive any documents that outline his or her training needs or requirements in Welsh; and if that is the employee's wish you must provide any such documents to him or to her in Welsh.	See above	<ul style="list-style-type: none"> <li>• Standard documentation, including advertising, applications, and confirmation of learning events are available bilingually.</li> <li>• Available on Council's Intranet.</li> </ul>
102	You must ask each employee whether he or she wishes to receive any documents that outline his or her performance objectives in Welsh; and if that is the employee's wish you must provide any such documents to him or to her in Welsh.	See above	<ul style="list-style-type: none"> <li>• Current standard documentation is available bilingually.</li> <li>• Available on the Council's Intranet.</li> </ul>
103	You must ask each employee whether he or she wishes to receive any documents that outline or record his or her career plan in Welsh; and if that is the employee's wish you must provide any such documents to him or to her in Welsh.	Request update from the Learning and Development team and Performance Management team	L&D have arranged for all active programmes [from 01.04.16] that outline and record employee development to be available in Welsh. These have been built into the Council's HR/Payroll [ResourceLink [RL] Training Module] system, and reporting structures [Cognos] have been updated to allow employees to choose documents that record their

			development [Training Profiles] in Welsh or English. These are integral to employee career plans.
105	If you publish a policy relating to behaviour in the workplace, you must publish it in Welsh.	Human Resources Department	Employment Policies available in Welsh and English and via the Council's intranet.
106	If you publish a policy relating to health and well-being at work, you must publish it in Welsh.	See above	Employee Wellbeing Policies available in Welsh and English and via the Council's intranet.
107	If you publish a policy relating to salaries or workplace benefits, you must publish it in Welsh.	See above	Employment Policies available in Welsh and English and via the Council's intranet.
108	If you publish a policy relating to performance management, you must publish it in Welsh.	Learning and Development	Policies are available bilingually and on the Council's Intranet.
109	If you publish a policy about absence from work, you must publish it in Welsh.	See above	Employment Policies available in Welsh and English and via the Council's intranet.
110	If you publish a policy relating to working conditions, you must publish it in Welsh.	See above	Employment Policies available in Welsh and English and via the Council's intranet.
111	If you publish a policy regarding work patterns, you must publish it in Welsh.	See above	Employment Policies available in Welsh and

			English and via the Council's intranet.
112	You must allow each member of staff - (a) to make complaints to you in Welsh, and (b) to respond in Welsh to any complaint made about him or about her.	Discuss with complaints dept.	
112A	You must state in any document that you have that sets out your procedures for making complaints that each member of staff may - (a) make a complaint to you in Welsh, and (b) respond to a complaint made about him or about her in Welsh; and you must also inform each member of staff of that right.	<ul style="list-style-type: none"> <li>- Discuss with complaints dept.</li> <li>- Human Resources dept to include in complaints procedures and induction package</li> <li>- Inform Managers and all staff of the right – content of Internal use of Welsh Policy</li> </ul>	Grievance procedures meet this standard.
114	If you receive a complaint from a member of staff or a complaint about a member of staff, and a meeting is required with that member of staff, you must - (a) ask the member of staff whether he or she wishes to use the Welsh language at the meeting; (b) explain that you will provide a translation service from Welsh to English for that purpose if it is required; and if the member of staff wishes to use the Welsh language, you must provide a simultaneous translation service from Welsh to English at the meeting (unless you conduct the meeting in Welsh without translation services).	<ul style="list-style-type: none"> <li>- Discuss with complaints dept.</li> <li>- Human Resources dept to include in complaints procedures and induction package</li> <li>- Inform Managers and all staff of the right – content of Internal use of Welsh Policy</li> </ul>	Grievance procedures meet this standard.  Completed

115	<p>When you inform a member of staff of a decision you have reached in relation to a complaint made by him or by her, or in relation to a complaint made about him or about her, you must do so in Welsh if that member of staff –</p> <ul style="list-style-type: none"> <li>(a) made the complaint in Welsh,</li> <li>(b) responded in Welsh to a complaint about him or about her,</li> <li>(c) asked for a meeting about the complaint to be conducted in Welsh, or</li> <li>(ch) asked to use the Welsh language at a meeting about the complaint.</li> </ul>	<ul style="list-style-type: none"> <li>- Discuss with complaints dept.</li> <li>- Human Resources dept to include in complaints procedures and induction package</li> <li>- Inform Managers and all staff of the right – content of Internal use of Welsh Policy</li> </ul>	<p>Grievance procedures meet this standard.</p> <p>Completed</p>
116	<p>You must allow all members of staff to respond in Welsh to allegations made against them in any internal disciplinary process.</p>	<ul style="list-style-type: none"> <li>- Human resources dept. to include in disciplinary procedures and induction package</li> <li>- Ask for update on disciplinary procedures</li> <li>- Inform managers and all staff of right – content of internal use of Welsh policy</li> </ul>	<p>Disciplinary process meets this standard.</p> <p>Completed</p>
116A	<p>You must -</p> <ul style="list-style-type: none"> <li>(a) state in any document that you have which sets out your arrangements for disciplining staff that any member of staff may respond in Welsh to any allegations made against him or against her, and</li> </ul>	<ul style="list-style-type: none"> <li>- Human resources dept. to include in disciplinary procedures and induction package</li> <li>- Ask for update on disciplinary procedures</li> </ul>	<p>Disciplinary process meets this standard.</p>

	(b) if you commence a disciplinary procedure in relation to a member of staff, inform that member of staff of that right.	- Inform managers and all staff of right – content of internal use of Welsh	Completed
118	If you organise a meeting with a member of staff regarding a disciplinary matter that relates to his or her conduct you must - (a) ask the member of staff whether he or she wishes to use the Welsh language at the meeting, and (b) explain that you will provide a translation service for that purpose if it is required; and, if the member of staff wishes to use the Welsh language, you must provide a simultaneous translation service from Welsh to English at the meeting (unless you conduct the meeting in Welsh without a translation service).	- Human resources dept. to include in disciplinary procedures and induction package - Ask for update on disciplinary procedures - Inform managers and all staff of right – content of internal use of Welsh	Disciplinary process meets this standard.  Completed
119	When you inform a member of staff of a decision you have reached following a disciplinary process, you must do so in Welsh if that member of staff – (a) responded to allegations made against him or her in Welsh, (b) asked for a meeting regarding the disciplinary process to be conducted in Welsh, or (c) asked to use the Welsh language at a meeting regarding the disciplinary process.	- Human resources dept. to include in disciplinary procedures and induction package - Ask for update on disciplinary procedures Inform managers and all staff of right – content of internal use of Welsh	Disciplinary process meets this standard.  Completed
120	You must provide staff with computer software for checking spelling and grammar in Welsh, and	• Cooperate with IT division on guidelines on how to use	It was ensured that the necessary language packs

	provide Welsh language interfaces for software (where an interface exists).	<p>technology to write in Welsh and keep an eye on Windows 2013 developments</p> <ul style="list-style-type: none"> <li>• Offer the explanation to other departmental newsletters</li> <li>• Include in the guidelines on Writing in Welsh</li> </ul>	<p>were distributed at the same time as Windows 2013 was introduced to all council staff. 'Writing in Welsh and your Computer' Guidance was published which included an explanation on using Welsh interfaces and software that checks spelling and grammar.</p> <p>Attention was given to the above Guidance in the staff newsletter and various internal meetings.</p>
122	<p>You must ensure that -</p> <p>(a) the text of the homepage of your intranet is available in Welsh,</p> <p>(b) any Welsh language text on your intranet's homepage (or, where relevant, your Welsh language intranet homepage) is fully functional, and</p> <p>(c) the Welsh language is treated no less favourably than the English language in relation to the homepage of your intranet.</p>	<ul style="list-style-type: none"> <li>• Hold discussions with the Communications Department and confirm timetable</li> </ul>	Completed. The intranet is completely bilingual.
123	<p>You must ensure that each time you publish a new intranet page or amend a page -</p> <p>(a) the text of that page is available in Welsh,</p>	Hold discussions with the Communications Department	Completed. The intranet is completely bilingual.



	<p>(b) any Welsh language version of that page is fully functional, and</p> <p>(c) the Welsh language is treated no less favourably than the English language in relation to the text of that page.</p>		
124	<p>If you have a Welsh language page on your intranet that corresponds to an English language page, you must state clearly on the English language page that the page is also available in Welsh, and must provide a direct link to the Welsh language page on the corresponding English language page.</p>	<p>Hold discussions with the Communications Department</p>	<p>Completed. The intranet is completely bilingual.</p>
125	<p>You must designate and maintain a page (or pages) on your intranet which provides services and support material to promote the Welsh language and to assist your staff to use the Welsh language.</p>	<ul style="list-style-type: none"> <li>• Ensure transfer of resources from the Welsh 'Parth'</li> <li>• Ensure that information on Language skills development opportunities appear on new intranet</li> <li>• Publish Support Guidelines on Writing in Welsh on intranet</li> </ul>	<p>Completed</p> <p>The 'Parth' resources are now on the intranet.</p> <p>There is a page on the intranet about opportunities to learn Welsh.</p> <p>Six guidelines have been uploaded to the new intranet explaining the Standards' requirements.</p> <p>The Leisure division's temporary signs have been checked and filed on the internal file plan.</p>

126	You must provide the interface and menus on your intranet pages in Welsh.	Discuss with the Marketing & Media team	Completed. The intranet is completely bilingual.
127	You must assess the Welsh languages skills of your employees.	<ul style="list-style-type: none"> <li>• Discuss with Human resources</li> <li>• Receive initial phase of audit results</li> <li>• Confirm arrangements for audit of language skills of staff without office contact</li> <li>• Receive audit results of staff without office contact</li> <li>• Ensure that information is transferred to outlook</li> <li>• Ensure that Learning and development receive information and respond through provision</li> </ul>	The first results of the audit have been received.
130	<p>You must provide opportunities during working hours -</p> <p>(a) for your employees to receive basic Welsh language lessons, and</p> <p>(b) for employees who manage others to receive training on using the Welsh language in their role as managers.</p>	<ul style="list-style-type: none"> <li>• Learning and Development to map current provision</li> <li>• Restructure provision</li> <li>• Market provision</li> </ul> <ul style="list-style-type: none"> <li>• Respond to the result of the Egin tendering process</li> </ul>	<p>Following delays with the Work Welsh tenders, a new programme of Welsh language courses was launched in accordance with the tender.</p> <p>The provision was extensively marketed and a significant increase was seen in the number of council staff who attended courses.</p> <p>See above</p>

		<ul style="list-style-type: none"> <li>• Offer a language development course to managers</li> <li>• Offer training to managers on the Language Skills Strategy</li> <li>• Receive the first phase results of the Language Skills Audit</li> <li>• Ensure that L and D receive data and respond with provision planning</li> <li>• Program of Welsh learning in place for new academic year</li> </ul>	<p>The course was not held in 2016/17.</p> <p>Human Resources department held briefing sessions for managers. See above.</p> <ul style="list-style-type: none"> <li>• A Learning &amp; Development Advisor (Welsh Language) has been recruited and will start on the 6<sup>th</sup> July in order to create an integrated programme. This programme will take into account the results of the language skills audit.</li> <li>• The range of language development courses has been increased. The Croeso i'r Gymraeg (level 1) has been well attended</li> <li>• Programme of Welsh learning under development for the new academic year.</li> </ul>
131	You must provide opportunities for employees who have completed basic Welsh language	As above	<ul style="list-style-type: none"> <li>• As above. Opportunities for employees to take up further Welsh language</li> </ul>

	<p>training to receive further training free of charge, to develop their language skills.</p>		<p>training [free of charge] include:</p> <ul style="list-style-type: none"> <li>○ Improving your Welsh: Spoken Welsh A [increased attendance from 5 to 7 on 15-16];</li> <li>○ Improving your Welsh: Spoken Welsh B;</li> <li>○ Improving your Welsh: Written &amp; Spoken Welsh;</li> <li>○ Improving your Welsh: Written Welsh [increased attendance from 3 to 10 on 15-16];</li> <li>○ Welsh Language Mentoring Skills [This programme aims to increase the number of Welsh Language Mentors to support Learners];</li> <li>○ A suite of Welsh for Adults Classes also include:             <ul style="list-style-type: none"> <li>○ Canolradd 1</li> <li>○ Canolradd 2</li> <li>○ Mynediad 1</li> <li>○ Mynediad 2</li> <li>○ Sylfaen 1</li> </ul> </li> </ul>
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			<ul style="list-style-type: none"> <li>○ Sylfaen 2</li> <li>○ [Available on the Council's Intranet]</li> </ul> <p>A 'Summer School' learning provision has also supported this Standard.</p>
132	<p>You must provide training courses so that your employees can develop -</p> <p>(a) awareness of the Welsh language (including awareness of its history and its role in Welsh culture);</p> <p>(b) an understanding of the duty to operate in accordance with the Welsh language standards;</p> <p>(c) an understanding of how the Welsh language can be used in the workplace.</p>	<ul style="list-style-type: none"> <li>• Communicate Internal use of Welsh Policy (S98)</li> <li>• Cooperate with L and D on new induction module with Optimwm</li> <li>• Continue with the discussion on creating a new language awareness module following consideration of the AWA* module content</li> <li>• Provide training through Sglein on provision of services in accordance with the Standards to the leisure dept.</li> <li>• Consider similar training for other departments</li> </ul> <p>** A new module is being developed by partner organisations within the All Wales Academy [AWA] - The new 'Croeso i'r Gymraeg' includes information on Welsh Language Awareness, understanding of the duty in accordance with the WL Standards and understanding of how the WL can be used in the workplace</p>	<p>See above standard 98</p> <p>It was arranged to include information about the language standards in the corporate induction module.</p> <p>A new language awareness module was developed to incorporate the changes introduced by the Language Measure and to explain the Welsh Language Standards</p> <p>A number of training sessions were provided by the company Sglein as well as a session on the departmental annual conference.</p> <p>This course of action with AWA was not followed. It was</p>

			<p>decided to include it all in the corporate module.</p> <ul style="list-style-type: none"> <li>▪ Croeso i'r Gymraeg, level 1 Welsh course is available to all staff – all non-level 1 staff are prioritised to meet minimum skills requirements.</li> <li>▪ E-learning modules - Highlights the responsibilities for public bodies to provide services in both Welsh and English and forms part of the engaging in diversity learning module. The Welsh language awareness will form part of a mandatory set of learning modules for all staff.</li> <li>▪ Mentoring Course - good working group linking with learners to provide additional support.</li> <li>▪ Customer Care – Basic Language development included.</li> <li>▪ Language improvement courses – take up improved.</li> <li>▪ Existing learning and development</li> </ul>
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			programmes/events continue to raise awareness of the need for language sensitive practice including - Effective communication, safeguarding, dementia and meaningful engagement. AMHP County Fora, DoLS practice exchanges, DoLS for Managing Authorities, Mental Health First Aid and Mental Capacity Act Training for Adult Placement Carers, Direct Payments training.
133	When you provide information to new employees (for example by means of an induction process), you must provide information for the purpose of raising their awareness of the Welsh language.	<ul style="list-style-type: none"> <li>• Design a current language awareness e-module for induction purposes</li> <li>• Include Language Awareness elements in new Induction e-module</li> <li>• Consider including the guideline leaflets in electronic package for new employees. Discuss with HR</li> </ul>	See standard 132 Recruitment and Induction/Welcome Packs available bilingually.
134	You must provide text or a logo for your staff to include in e-mail signatures which will enable them to indicate whether they speak Welsh fluently or whether they are learning the language.	<ul style="list-style-type: none"> <li>• Develop wording and include it in the Support Guidelines on Writing Welsh</li> <li>• Keep a record of possible support for a new resource on the intranet</li> <li>• Commission development of a</li> </ul>	The guidance 'Writing in Welsh and your computer' has been completed. Staff were reminded through the staff newsletter of the need to include the logo speaking or learning Welsh on e-mail.

		<p>new resource.</p> <ul style="list-style-type: none"> <li>• Include reference to guidelines in Internal Use of Welsh Policy</li> <li>• Discuss with IT the possibility of including statement on Welsh language in every email</li> </ul>	<p>Completed</p> <p>Canolfan Peniarth was commissioned to create supporting resources for the intranet. Completed</p> <p>It was decided not to discuss with IT as the current arrangements in terms of sharing the guidelines with staff works well.</p>
135	<p>You must provide wording for your employees which will enable them to include a Welsh language version of their contact details in e-mail messages, and to provide a Welsh language version of any message which informs others that they are unavailable to respond to e-mail messages.</p>	<ul style="list-style-type: none"> <li>• Support BSO to monitor Out of Office messages following the publication of guidelines</li> <li>• Include in the guideline 'Writing in Welsh'</li> <li>• Include in Internal Use of Welsh Policy</li> <li>• Consider publishing guidelines on form of posters to circulate through staff working group</li> <li>• Check names of departments with HR</li> </ul>	<p>Completed</p> <p>Completed</p> <p>The wording has been included in the IT department's guideline 'Using e-mail'</p> <p>Guidelines were printed as posters and were distributed to the Language Leaders, and in the road shows.</p>



136	<p>When you assess the requirements for a new or vacant post, you must assess the need for Welsh language skills, and categorise it as a post where one or more of the following apply -</p> <p>(a) Welsh language skills are essential;  (b) Welsh language skills need to be learnt when appointed to the post;  (c) Welsh language skills are desirable; or  (ch) Welsh language skills are not necessary.</p>	<ul style="list-style-type: none"> <li>• Human Resources department / Language Skills Strategy</li> <li>• New Language Skills Strategy adopted in January 2016</li> <li>• Guidelines on Language Skills and Recruitment circulated to all managers and heads of service</li> <li>• All council jobs are advertised on level 1 on the skills assessment framework as a minimum</li> <li>• Monitor Job descriptions</li> <li>• Maintain regular meetings with HR</li> <li>• Check the link form the job descriptions to the new Strategy</li> <li>• Discuss with HR monitoring work</li> </ul>	Completed
136A	<p>If you have categorised a post as one where Welsh language skills are essential, desirable or need to be learnt you must -</p> <p>(a) specify that when advertising the post, and  (b) advertise the post in Welsh.</p>	HR/Skills Strategy	Completed
137	<p>When you advertise a post, you must state that applications may be submitted in Welsh, and that an application submitted in Welsh will not be treated less favourably than an application submitted in English.</p>	Monitor compliance	<p>Completed</p> <p>Front page of jobs pages on Council website carry the following text: Applications for a post may be submitted in Welsh or English.</p>

137A	<p>If you publish -</p> <ul style="list-style-type: none"> <li>(a) application forms for posts;</li> <li>(b) material that explains your procedure for applying for posts;</li> <li>(c) information about your interview process, or about other assessment methods when applying for posts;</li> <li>(ch) job descriptions;</li> </ul> <p>you must publish them in Welsh; and you must ensure that the Welsh language versions of the documents are treated no less favourably than any English language versions of those documents.</p>	HR – check explanatory resources regarding new skills strategy	Completed Welsh and English job pages available on Council website.
137B	<p>You must not treat an application for a post made in Welsh less favourably than you treat an application made in English (including, amongst other matters, in relation to the closing date you set for receiving applications and in relation to any time-scale for informing individuals of decisions).</p>	HR – Check current guideline and develop new guideline on recruitment and the Welsh Language	Completed  Our recruitment procedures meet this standard.
139	<p>You must ensure that your application forms for posts -</p> <ul style="list-style-type: none"> <li>(a) provide a space for individuals to indicate that they wish to use the Welsh language at an interview or at any other method of assessment, and</li> </ul>	HR – discuss (a) in terms of application forms and provision of simultaneous translation	Completed Application form meets standard.

	(b) explain that you will provide a translation service from Welsh to English for that purpose if it is required; and, if the individual wishes to use the Welsh language at the interview or assessment, you must provide a simultaneous translation service at the interview or assessment (unless you conduct the interview or assessment in Welsh without that translation service).		
140	When you inform an individual of your decision in relation to an application for a post, you must do so in Welsh if the application was made in Welsh.	HR	Completed Standard documentation is available bilingually.
141	When you erect a new sign or renew a sign in your workplace (including temporary signs), any text displayed on the sign must be displayed in Welsh (whether on the same sign as the corresponding English language text or on a separate sign), and if the same text is displayed in Welsh and in English, you must not treat the Welsh language text less favourably than the English language text.	<ul style="list-style-type: none"> <li>• Ensure that Corporate Property and Property Maintenance include this Standard in their procedures.</li> <li>• Create database on intranet of terms and signs – prioritising leisure division</li> </ul>	Completed  Completed
142	When you erect a new sign or renew a sign in your workplace (including temporary signs) which conveys the same information in Welsh and in English, the Welsh language text must be positioned so that it is likely to be read first.	<ul style="list-style-type: none"> <li>• Ensure that Corporate Property and Property Maintenance include this Standard in their procedures.</li> </ul>	Completed

143	You must ensure that the Welsh language text on signs displayed in your workplace is accurate in terms of meaning and expression.	<ul style="list-style-type: none"> <li>• Ensure that Corporate Property and Property Maintenance include this Standard in their procedures.</li> </ul>	Completed
144	When you make announcements in the workplace using audio equipment, that announcement must be made in Welsh, and if the announcement is made in Welsh and in English, the announcement must be made in Welsh first.	<ul style="list-style-type: none"> <li>• Identify which workplaces use public announcements</li> <li>• Communicate Standard with those workplaces</li> <li>• Include in Public Events and meeting guideline</li> </ul>	Completed
167	You must ensure that a document which records the operational standards with which you are under a duty to comply, and the extent to which you are under a duty to comply with those standards, is available - (a) on your website, and (b) in each of your offices that are open to the public.	<ul style="list-style-type: none"> <li>• Discuss with the Marketing &amp; Media team the need to publish documents relating to the Standards on the Council website</li> <li>• Publish Standards document on Council Website</li> </ul>	Completed  Completed  (b) A presentation was made to the Customer Services Team regarding the standards which included referring staff to the documents on the website. A link was sent to staff following the meeting to assist with this.
168	You must - (a) ensure that you have a complaints procedure that deals with the following matters - (i) how you intend to deal with complaints relating to your compliance with the operational standards with which you are under a duty to	<ul style="list-style-type: none"> <li>• See Standards 162 and 156</li> <li>• Update the complaint procedures according to Standards</li> </ul>	Completed

	<p>comply, and</p> <p>(ii) how you will provide training for your staff in relation to dealing with those complaints, and</p> <p>(b) publish a document that records that procedure on your intranet.</p>	<ul style="list-style-type: none"> <li>Continue discussion on managers' roles within procedure</li> </ul>	
169	<p>You must -</p> <p>(a) ensure that you have arrangements for</p> <p>(i) overseeing the way you comply with the operational standards with which you are under a duty to comply,</p> <p>(ii) promoting the services that you offer in accordance with those standards, and</p> <p>(iii) facilitate the use of those services, and</p> <p>(b) publish document that records that procedure on your intranet.</p>	<ul style="list-style-type: none"> <li>Publish Action Plan as the first Annual Report. Include preface by the portfolio member and specific attachments</li> <li>Promote services internally through y Gair and E-gair, staff guidelines and briefing sessions</li> <li>Promote services to public through Carmarthenshire news internet page</li> <li>Continue to develop and implement Communication Plan</li> </ul>	<p>A format for the annual action plan was agreed upon as well as including elements of promoting, facilitating and monitoring.</p> <p>Completed</p>
170	<p>(1) You must produce a report (an "annual report"), in Welsh, in relation to each financial year, which deals with the way in which you have complied with the operational standards with which you were under a duty to comply during that year.</p> <p>(2) The annual report must include the following information (where relevant, to the extent you are under a duty to comply with the standards referred to) -</p> <p>(a) the number of employees who have Welsh language skills at the end of the year in question (on the basis of the records you kept in</p>	<p>The Annual Report will include elements of promoting, facilitating and overseeing</p>	<p>A format to report was agreed upon as well as including elements of promoting, facilitating and monitoring which was the annual report.</p> <ul style="list-style-type: none"> <li>Training Course Applications include provision for language preference at request stage.</li> </ul>

<p>accordance with standard 151);</p> <p>(b) the number of members of staff who attended training courses you offered in Welsh during the year (on the basis of the records you kept in accordance with standard 152);</p> <p>(c) if a Welsh version of a course was offered by you during that year, the percentage of the total number of staff attending the course who attended the Welsh version (on the basis of the records you kept in accordance with standard 152); (ch) the number of new and vacant posts that you advertised during the year which were categorised as posts where - Welsh language skills were essential, Welsh language skills needed to be learnt when appointed to the post, Welsh language skills were desirable, or Welsh language skills were not necessary, (on the basis of the records you kept in accordance with standard 154); (d) the number of complaints that you received during that year which related to your compliance with the operational standards with which you were under a duty to comply. 3) You must publish the annual report no later than 30 June following the financial year to which the report relates.</p> <p>(3) You must publicise the fact that you have published an annual report.</p> <p>(4) You must ensure that a current copy of your annual report is available -</p> <p>(a) on your website, and</p>		<p>170 [b] – between 01.04.16 – 31.03.17 the following applied: 4293 employee attendances based on training courses offered in Welsh during the year.</p> <ul style="list-style-type: none"> <li>• 170 [c] – between 01.04.16 to 31.03.17 the following applied: Of 4293 employee attendances offered in Welsh, 325 attended the Welsh version [7.57%].</li> </ul>
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	(b) in each of your offices that are open to the public.		
171	You must publish a document on your website which explains how you intend to comply with the operational standards with which you are under a duty to comply.	Publish Action Plan	Completed
172	You must provide any information requested by the Welsh Language Commissioner which relates to compliance with which you are under a duty to comply.	Act responsively to the Commissioner's enquiries.	

## Class of Standard: Record Keeping

Standard Number	Standard	Action Points 16-17	Status and evidence
147	You must keep a record, in relation to each financial year, of the number of complaints you receive relating to your compliance with standards.	<ul style="list-style-type: none"> <li>Discuss with Performance management team (see 168)</li> <li>Continue with procedure until update in terms of informing heads of service</li> </ul>	Continue to keep a record
148	You must keep a copy of any written complaint that you receive that relates to your compliance with the standards with which you are under a duty to comply.	Complaints team– ensure that the team keeps record of original written complaint	Completed
149	You must keep a copy of any written complaint that you receive that relates to the Welsh language (whether or not that complaint relates to the standards with which you are under a duty to comply).	Complaints team– ensure that the team keeps record of original written complaint	Completed
150	You must keep a record of the steps that you have taken in order to ensure compliance with the policy making standards with which you are under a duty to comply.	<ul style="list-style-type: none"> <li>If a guideline on the impact of policies on the Welsh language is developed (see S88) we will need to ensure that this Standard is included in it</li> </ul>	Continuing



		<ul style="list-style-type: none"> <li>• Ensure that managers take responsibility for recording impact assessments</li> </ul>	
151	You must keep a record (following assessments of your employees' Welsh language skills made in accordance with standard 127), of the number of employees who have Welsh language skills at the end of each financial year and, where you have that information, you must keep a record of the skill level of those employees.	<ul style="list-style-type: none"> <li>• Discuss with HR</li> <li>• Receive initial phase audit results</li> <li>• Confirm arrangements for holding paper phase of audit</li> <li>• Receive paper phase results</li> <li>• Ensure information is transferred to Outlook</li> <li>• Ensure that L and D receive data and respond with provision planning</li> </ul>	<p>Completed</p> <p>Completed</p> <p>Questionnaire on paper has been circulated to non-office based staff</p>
153	You must keep a copy of every assessment that you carry out (in accordance with standard 136) in respect of the Welsh language skills that may be needed in relation to a new or vacant post.	Discuss with HR	Copies of assessments retained.
154	You must keep a record, in relation to each financial year of the number of new and vacant posts which were categorised (in accordance with standard 136) as posts where – (a) Welsh language skills are essential; (b) Welsh language skills need to be learnt when appointed to the post; (c) Welsh language skills are desirable; or	<ul style="list-style-type: none"> <li>• Discuss with HR</li> <li>• Ensure that we monitor in accordance with the Council Skills Strategy and assessment framework</li> </ul>	Completed

	(ch) Welsh language skills are not necessary.		
175	<p>You must ensure that a document which records the record keeping standards with which you are under a duty to comply, and the extent to which you are under a duty to comply with those standards, is available -</p> <p>(a) on your website, and (b) in each of your offices that are open to the public.</p>	<ul style="list-style-type: none"> <li>• Publish Standards document on Council webpage</li> <li>• Confirm timetable with the Marketing &amp; Media team</li> </ul>	<p>Completed</p> <p>(b) A presentation was made to the Customer Services Team regarding the standards which included referring staff to the documents on the website. A link was sent to staff following the meeting to assist with</p>
176	<p>You must provide any records you kept in accordance with the record keeping standards with which you are under a duty to comply to the Welsh Language Commissioner, if the Commissioner asks for those records.</p>	<p>Act responsively to the Commissioner's enquiries.</p>	

**Standards required to comply with within a year.**

Standard Number	Class of standard	Standard	Action Points 16-17	Status and evidence
76	Service Delivery	Any invitations to tender for a contract that you publish must be published in Welsh, and you must not treat a Welsh language version of any invitation less favourably than an English language version.	<ul style="list-style-type: none"> <li>• Include in Procurement, Grants and tendering guideline</li> <li>• Request update from procurement unit and ensure that translation is underway</li> <li>• Research into the possibility of promoting this service e.g.Sell4Wales</li> </ul>	<p>It was decided not to create this guidance as the Commissioner has published a similar document.</p> <p>All documentation is available bilingually.</p> <p>Concerns re: Bravo have been raise with the Commissioner's Office</p>
104	Operational	<p>You must ask each employee whether he or she wishes to receive any forms that record and authorise -</p> <ul style="list-style-type: none"> <li>• annual leave,</li> <li>• absences from work, and</li> <li>• flexible working hours,</li> </ul> <p>in Welsh; and if that is an employee's wish, you must provide any such forms to him or to her in Welsh.</p>	<ul style="list-style-type: none"> <li>• Continue with regular meetings with HR</li> <li>• Request update on Resource Link software</li> </ul>	<p>Standard documentation is available bilingually.</p> <p>Available on Council's intranet.</p>

121	Operational	You must ensure that – the text of each page of your intranet is available in Welsh, every Welsh language page on your intranet is fully functional, and the Welsh language is treated no less favourably than the English language on your intranet.	<ul style="list-style-type: none"> <li>• Work on intranet is underway</li> <li>• Request update on timetable</li> <li>• Cooperate with Marketing &amp; Media on Welsh content and ensuring transfer of current resources</li> </ul>	Completed
128	Operational	You must provide training in Welsh in the following areas, if you provide such training in English - (a) recruitment and interviewing; (b) performance management; (c) complaints and disciplinary procedures; (ch) induction; (d) dealing with the public; and (dd) health and safety.	Meet with L&D to discuss provision	<ul style="list-style-type: none"> <li>• The option to receive training in either language is offered on all applications. The level of take-up is identified above. All existing e-Learning modules are in the process of being translated and all new modules (including induction) are published bilingually.</li> </ul>
129	Operational	You must provide training (in Welsh) on using Welsh effectively in; (a) meetings; (b) interviews; and (c) complaints and disciplinary	Arrange meeting with L&D to discuss provision and additional opportunities to add provision to L&D strategy	<ul style="list-style-type: none"> <li>• As above</li> <li>• Corporate Complaints/Compliments Training is currently available bilingually through e-learning.</li> </ul>
145	Promotion	You must produce, and publish on your website, a 5-year	<ul style="list-style-type: none"> <li>• Discuss the draft with the County Forum and the Advisory Panel</li> </ul>	Completed

		<p>strategy that sets out how you propose to promote the Welsh language and to facilitate the use of the Welsh language more widely in your area; and the strategy must include (amongst other matters) -</p> <p>(a) a target (in terms of the percentage of speakers in your area) for increasing or maintaining the number of Welsh speakers in your area by the end of the 5 year period concerned, and</p> <p>(b) a statement setting out how you intend to reach that target; and you must review the strategy and publish a revised version on your website within 5 years of publishing a strategy (or of publishing a revised strategy).</p>	<ul style="list-style-type: none"> <li>• Decide on format of Action Plan</li> <li>• Confirm timetable for passing Strategy through democratic process</li> <li>• Publish document on website</li> <li>• Look at possibility of implementing a specific project following publication of document</li> </ul>	<p>Completed</p> <p>Completed</p> <p>Specific projects were started including mapping finding measures and creating a leaflet to promote bilingualism</p>
146	Promotion	<p>Five years after publishing a strategy in accordance with standard 145 you must –</p> <p>a) assess to what extent you have followed that strategy and have reached the target set by it, and</p>	<ul style="list-style-type: none"> <li>• Report on progress against Action Plan (see 145)</li> <li>• Revise reporting procedures of organisations that promote the Welsh language in order to ensure that we receive the correct information for reporting</li> </ul>	<p>Completed</p>

		<p>b) publish that assessment on your website, ensuring that it contains the following information</p> <p>i) the number of Welsh speakers in your area, and the age of those speakers;</p> <p>ii) a list of the activities that you have arranged or funded during the previous 5 years in order to promote the use of the Welsh language.</p>	<ul style="list-style-type: none"> <li>• Publish report</li> </ul>	
152	Record Keeping	<p>You must keep a record, for each financial year of –</p> <p>a) the number of members of staff who attended training courses offered by you in Welsh (in accordance with standard 128), and</p> <p>b) if a Welsh version of a course was offered by you in accordance with standard 128, the percentage of the total number of staff attending the course who attended that version.</p>	<ul style="list-style-type: none"> <li>• L&amp;D to monitor course attendees</li> <li>• Collate information for Annual Report</li> </ul>	<ul style="list-style-type: none"> <li>• Training Course Applications include provision for language preference at request stage.</li> </ul> <p>152 [a] – between 01.04.16 – 31.03.17 the following applied: 4293 employee attendances based on training courses offered in Welsh during the year [in accordance with S128].</p> <ul style="list-style-type: none"> <li>• 152 [b] – between 01.04.16 to 31.03.17 the following applied:</li> </ul>

				Of 4293 employee attendances offered in Welsh, 325 attended the Welsh version [7.57%] [in accordance with S128].
173	Promotional	You must ensure that a document which records the promotion standards with which you are under a duty to comply, and the extent to which you are under a duty to comply with those standards, is available – a) on your website, and b) in each of your offices that are open to the public.	<ul style="list-style-type: none"> <li>• Publish document on website</li> <li>• Confirm timetable with Marketing &amp; Media team</li> </ul>	Completed (b) A presentation was made to the Customer Services Team regarding the standards which included referring staff to the documents on the website. A link was sent to staff following the meeting to assist with this.
174	Promotional	You must provide any information requested by the Welsh Language Commissioner which relates to compliance with the Promotion Standard by which you are under a duty to comply.	Act responsively to the Commissioner's enquiries.	

## Writing in Welsh and your Computer



We can use technology to help us write in Welsh in our work. There is a Welsh spell-check available. There are dictionaries available on line and there are templates that we can put in place to help us get things right. Here's how...

### Windows in Welsh

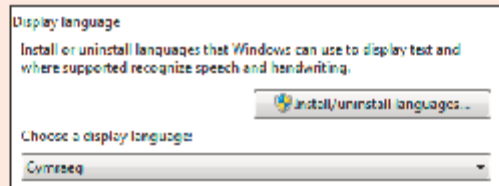
If you set **Windows** to use Welsh, all your icons and files will be in Welsh on all your Windows programmes.

This might feel awkward to begin with as you are so familiar with the English terms, but you will get used to seeing the Welsh icons quickly, as they are in exactly the same position as the English.

This will, without a doubt, improve your Welsh by helping you get used to every day work terms in Welsh.

This is how to set Windows in Welsh:

- Click on Start
- Click on Control Panel
- Click on Region and Language
- Click on Keyboards and Languages
- Select Cymraeg from the drop down box



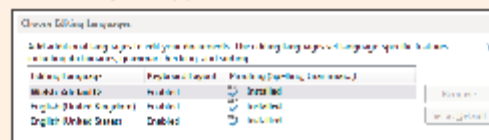
### Office in Welsh

In the same way, you can have your icons in Welsh in the Office programmes, Outlook, Excel, Word and Powerpoint.

Again, the icons will appear in the same place as in the English version and you will soon get used to terms such as 'cadw' instead of 'Save'.

This is how to set Office in Welsh:

- Open Microsoft Word
- Click File, Options, Language
- Click Choose Display and Help Languages,
- Click on Welsh [Cymraeg] in each table
- Click Set as Default



Close all Microsoft Office programs for the change to take effect

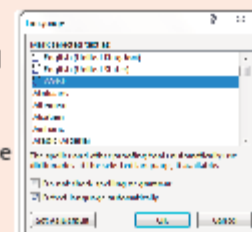
### Grammar and spell-check

#### Microsoft Office

You can have Office programmes to proof read your work as you write in Welsh. You can switch back and forward between the Welsh and English proofreading tool whenever it suits you as you work on Welsh and English documents. You can even highlight part of your text to check the spelling in Welsh before switching back to English to correct an English text within the same document.

This is how:

- Open Microsoft Word
- Click Review, Language, Set proofing language
- Click Welsh
- Click Set as Default
- Click OK



The spell-check will put red lines under the misspelt words.

Standards 7, 120, 125, 134-5



## Appendix 2 – Welsh Language Standards Communication Plan 2016-17

### Corresponding directly with Staff

Timetable	Themes / Main messages	Main medium
<b>May 2016</b>	Responsibilities when arranging meetings by invitation	Regeneration and policy newsletter
	Responsibilities involving recruitment and the Welsh language	Y Gair / e-Gair
<b>June 2016</b>	Displaying signs: promoting Guideline 7 - Designing and publishing	Y Gair / e-Gair
<b>July 2016</b>	Responsibilities when corresponding : promoting Guideline 3	Y Gair / e-Gair
	Information Stand: promoting the guidelines and opportunities to learn Welsh	Staff Road shows
<b>September 2016</b>	Opportunities to learn Welsh	Y Gair / e-Gair
	Training session on the Standards	Training session with translation unit
	Printing and publishing bilingually	Posters for printer rooms
<b>October 2016</b>	Information Stand: promoting the guidelines and opportunities to learn Welsh	Managers Conference
	Promoting <i>Shwmae Sumae</i> day and Welsh language learning opportunities	Dot-mailer message to all staff from Cllr. Mair Stephens
<b>November 2016</b>	Responsibilities when displaying marketing materials	Y Gair / e-Gair
<b>January 2017</b>	Catch-up courses, mentor and Welcome to Welsh courses	Y Gair / Marketing Department weekly bulletin and <i>Intranet News</i> Dot-mailer message to all staff from Cllr. Mair Stephens (*see below)
<b>February 2017</b>	Promote guideline 6 – Writing in Welsh and your computer	Y Gair / Marketing Department weekly bulletin and <i>Intranet News</i>
	Promoting the guidelines and the responsibility of giving the public access to the annual report in our centres	Presentation to Customer services staff
	Promoting the new Clwb Clecs for learners	Intranet
<b>March 2017</b>	Promoting Leisure department’s Welsh language mentors	Y Gair / Marketing Department weekly bulletin and <i>Intranet News</i>
<b>April 2017</b>	Check the bilingualism of public buildings	Y Gair / Marketing Department weekly bulletin and <i>Intranet</i>

		<b>News</b>
	Responsibility when printing bilingually	Distribute posters to be displayed in printer rooms (see below)

Error loading Partial View script (file: ~/Views/MacroPartials/MemberMaker.cshtml)

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[OUR PEOPLE](#) | [LATEST NEWS](#) | [NEWSLETTERS](#) | [WHAT'S ON](#) | [WHO'S WHO](#) | [STAFF FORUM](#) | [A-Z](#)

Q

**MAKE LEARNING WELSH YOUR NEW YEAR'S RESOLUTION!**

Thank you for completing the Welsh language skills audit last year. We have all made new year resolutions, so why not make one of yours developing a new skill? We have a range of programmes available to help you learn or improve your Welsh language skills.

- For the 24% of you who have no Welsh language skills, why not start on your journey to Learning Welsh by attending the [Welcome to Welsh course](#)? This helpful half day session will introduce you to some basic phrases and help your pronunciation.
- ...and for those of you who would like to develop your skills further, why not consider a [5 session catch-up course \(Cwrs Cartiam\)](#) which will bring you up to speed so you can join one of the Mynediad 1 courses that started in October?
- If you need to build your confidence in speaking Welsh, why not join the Clwb Siarad starting in 'Blas Myrddin', St David's Park every Thursday at 1.30 – 2.00 pm, starting on the 19 January 2017. You can call in for advice on courses, or to have a chat to practise your Welsh.
- Writing in Welsh - A third of the Council's staff can write Welsh for informal use, with a quarter also confident to write formal Welsh. To help you use these skills in the workplace, we have prepared [Guidelines: Writing in Welsh and your Computer](#) to enable you to adapt the computer to help you write in Welsh. For example you can use a Welsh spellcheck in Word or change your icons in Windows to be in Welsh.

**SIGN UP...**

Sign up and receive the weekly update on your personal e-mail address.

Choose your language preference

Cymraeg

English

powered by

**Promoting Welsh courses on the intranet**

Caerfyrddin a £250,000 i ariannu ystod o fesurau sy'n cynnwys gwella mynediad i Ysgol Gynradd Pontyberem.

[» Darllen mwy](#)



### Clwb Clecs Caerfyrddin

Mae clwb misol newydd i ddysgwyr a siaradwyr Cymraeg yng Nghaerfyrddin cael cyfle i sgwrsio ac ymlacio yn cael ei lansio'r wythnos nesaf.

Mae Clwb Clecs Caerfyrddin yn cael ei drefnu ar y cyd rhwng Menter Iaith Gorllewin Sir Gâr, y Cyngor Sir a Dysgu Cymraeg Sir Gâr.

[» Darllen mwy](#)



### Ci a gafodd ei achub gan warden yn 'gwella'n dda'

**Promoting 'Clwb Clecs' a conversational club for learners on the intranet**

**Promoting the Welsh language: Corresponding with the public**

Timetable	Themes / main messages	Main medium
February 2016	Contact the council in Welsh ...'	Carms News and <i>Lloffwr</i> (*see below)
April 2016	Contact the council in Welsh ...'	Bus stops 'Pa bynnag ffordd' (*see below)
June 2016		County's Markets
June 2016	'Contact the council in Welsh...'	Tenant 2 Tenant Summer
October 2016	Link to <i>Amdani</i> website and questionnaire on use of Welsh	<i>Shwmae Sumae</i> email from Leisure dept to sports clubs (*see below)
January 2017	Promote Promotion Strategy (see below)	Banner on website
February 2017	Help is available to work bilingually	Events organisers conference
March 2017	Promote Bilingual education	Booklet 'Being bilingual in Carmarthenshire' (*appendix 5)
March 2017	'You are welcome to speak Welsh' with the council	Design and print desk display triangles

## Pa bynnag ffordd...



...mae 'na groeso i chi **gysylltu** â Chyngor Sir Gâr yn **Gymraeg**



**IAITH SIR GÂR**  
 EICH CYNGOR **arleinamdani**  
 www.sirgar.llyw.cymru/trafodiath  
 YOUR COUNCIL **doitonline**  
 www.carmarthenshire.gov.wales/trafodiath

## Learning the language?



...you are welcome to **contact us in Welsh**



**IAITH SIR GÂR**  
 EICH CYNGOR **arleinamdani**  
 www.sirgar.llyw.cymru/trafodiath  
 YOUR COUNCIL **doitonline**  
 www.carmarthenshire.gov.wales/trafodiath

**Promoting the council's Welsh medium services to Welsh speakers and learners**



**Promoting council's Welsh medium services on Bus stops**

## Shwmae Su'mae Day! October 15.



October 15th is a day to celebrate the Welsh language. Why not start your training session this weekend in Welsh? Everyone in Carmarthenshire can understand 'Shwmae' and many other Welsh words, even if they're not fluent Welsh speakers. If you would like help with Welsh Sports terminology, or Welsh resources, go to

<http://www.comisiynyddygyymraeg.cymru/hybu/en/guidelines/Pages/amdani!.aspx>

And as we are celebrating using Welsh, why not fill in this questionnaire below and send it back to HGJones@sirgar.gov.uk. If you send it back, you will receive flash cards for your club to help you use Welsh while coaching.

1. Name of Club:
2. Which sport?
3. Are you a Welsh medium Club  Mainly English  Bilingual
4. How many of your coaches can speak Welsh?
5. Do you have specific Welsh training sessions?
6. How many of your members can speak Welsh?
7. Would you like to have more help to make your club become more bilingual?





**Promoting the Welsh Language promotion strategy on the Council website**

## Appendix 3 – Chairing meetings

Safonau Iaith Cyngor Sir Gâr  
Carmarthenshire County Council Welsh Language Standards

### Cadeirio Cyfarfodydd Chairing meetings

Croeso i'r cyfarfod	Welcome to the meeting
Croeso yma heddiw	Welcome here today
Diolch am ddod yma heddiw	Thank you for coming here today
Mae'r cyfarfod yn ddwyieithog	This is a bilingual meeting
Croeso i chi ddefnyddio Cymraeg neu Saesneg	You're welcome to use Welsh or English
Mae cyfieithu ar y pryd ar gael	Simultaneous translation is available
Croeso i..., y cyfieithydd	Welcome to..., the translator
Ydy'r clustffonau'n gweithio?	Do the headphones work?
Dechreuwn	We'll start
Oes unrhyw ymddiheuriadau?	Are there any apologies?
Trown at yr agenda	We'll turn to the agenda
Yr eitem gyntaf ar yr agenda ydy..	The first item on the agenda is..
Awn drwy gofnodion y cyfarfod blaenorol	We'll go through the agenda of the previous meeting
Hoffai unrhyw un gynnig fod y cofnodion yn gywir?	Would anyone like to propose that the minutes are correct?
Mae angen ethol swyddogion	We need to elect officers
Oes unrhyw un am gynnig ei hun?	Would anyone like to offer themselves?
Oes unrhyw un yn eilio?	Does anyone second that?
Pasiwyd y cynnig	The motion has been passed
Yr eitem nesaf ydy	The next item
Ac yn olaf...	And lastly...
Oes unrhyw faterion yn codi?	Any matters arising?
Oes gennych chi unrhyw sylwadau?	Do you have any comments?
Oes gennych chi unrhyw gwestiynau?	Do you have any questions?
Oes unrhyw fater arall?	Any other business?

Safon 125, 8, 9, 10, 18, 20



## Appendix 4 – Printer posters



**IAITH**  
**SIRGAR**



**Cofiwch y camau hyn  
wrth argraffu deunyddiau  
yn ddwyieithog**



**Remember the following  
steps when printing  
materials bilingually**



### Sicrhewch fod:

- ✓ Y Gymraeg yn y safle y mae fwyaf tebygol o gael ei ddarllen yn gyntaf – e.e. ar y top neu ar yr ochr chwith
- ✓ Y ddwy iaith yn gywir o ran ystyr a mynegiant
- ✓ Angen i bob dogfen a llythyr sy'n cael ei ddsbarthu i'r cyhoedd fod yn ddwyieithog
- ✓ Fersiynau dwyieithog sy'n gweithio orau – cefn wrth gefn
- ✓ Os ydych chi'n cyhoeddi llythyr, nodwch ar bob llythyr Saesneg a Chymraeg 'Mae croeso i chi gysylltu gyda'r Cyngor trwy gyfrwng y Gymraeg neu'r Saesneg. You're welcome to contact the council through the medium of Welsh or English'
- ✓ Eich manylion cyswllt yn ddwyieithog ar lythyrau.

### Please ensure that:

- ✓ The Welsh language is in a position where it is most likely to be read first – i.e. on the top or to the left hand side
- ✓ Both languages are correct in terms of meaning and expression
- ✓ Every document and letter that is sent out to the public is bilingual
- ✓ Bilingual versions work best - back to back
- ✓ If you're printing a letter, state on every English and Welsh letter, 'Mae croeso i chi gysylltu gyda'r Cyngor trwy gyfrwng y Gymraeg neu'r Saesneg. You're welcome to contact the council through the medium of Welsh or English'
- ✓ Include your contact details bilingually on letters.

Gallwch gael gwybodaeth  
pellach am y **Safonau Iaith**  
ar y fewnryd.

Cysylltwch â  
[iaithgymraeg@sirgar.gov.uk](mailto:iaithgymraeg@sirgar.gov.uk)  
am fanylion pellach.



Further guidelines on the  
**Welsh Language Standards**  
can be found on the intranet.

Contact  
[welshlanguage@carmarthenshire.gov.uk](mailto:welshlanguage@carmarthenshire.gov.uk)  
for further details.



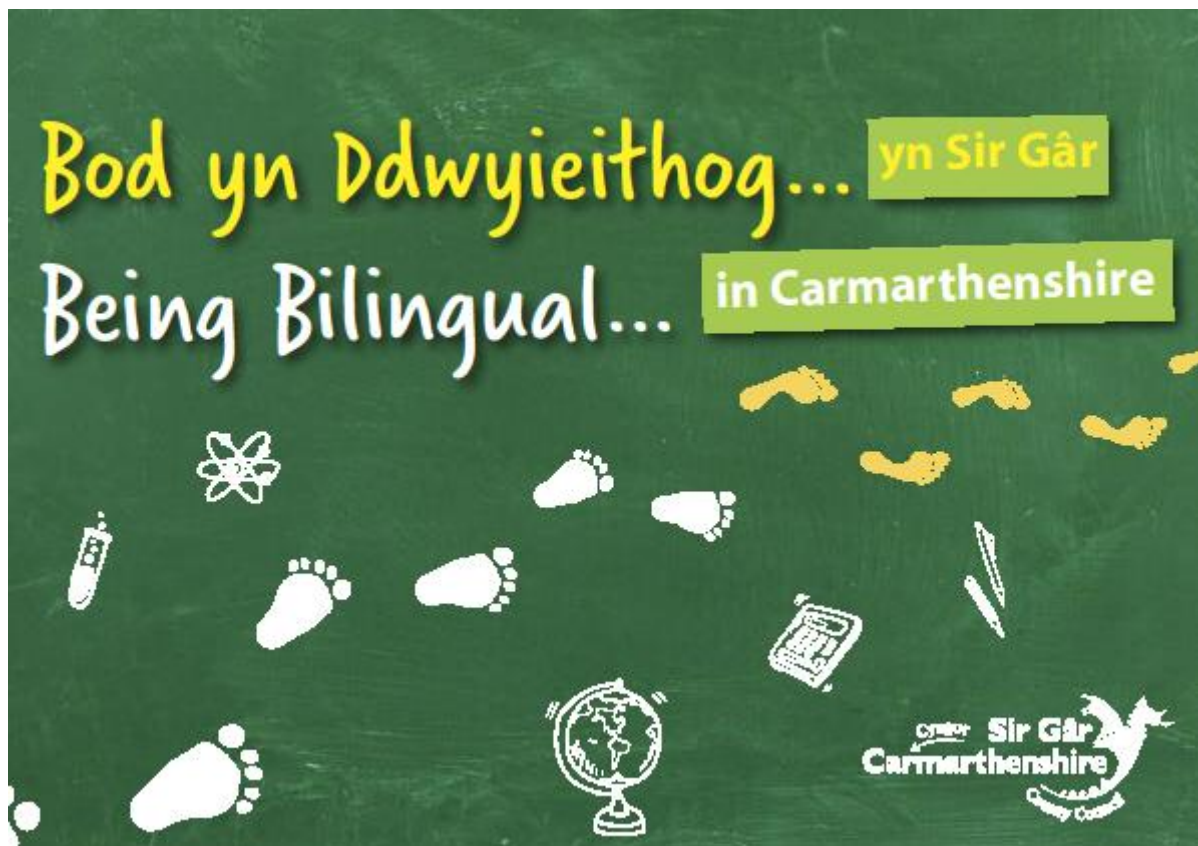
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**YOUR COUNCIL dotonline**  
[www.carmarthenshire.gov.wales/trafodiaith](http://www.carmarthenshire.gov.wales/trafodiaith)



Appendix 5 - A pamphlet promoting the advantages of bilingualism



## Appendix 6: Complaints received during 2016/17

Listed below are the Complaints received during 2016/17 and a summary of the response and action taken.

All Complaints were dealt with in accordance to the council's Complaints procedure.

	<b>Complaint</b>	<b>Response and action</b>
1.	Complaint regarding swimming instructor post that was advertised with a level 2 Welsh language requirement noting that basic Welsh language skills are sufficient.	<ul style="list-style-type: none"> <li>The swimming instructor post was reassessed and the Welsh language requirement was changed to level 3.</li> </ul>
2.	Complaint regarding School Governors training programme with a lack of Welsh medium provision. The Council was also informed that the web security course was being advertised in English only.	<ul style="list-style-type: none"> <li>It was decided not to hold the web security training course until the external company could find a trainer who could speak Welsh.</li> <li>An assessment of the Governor's language choice was made asking what language they would wish to receive their training in order to plan the training programme for the next academic year.</li> </ul>
3.	A complaint regarding a mistake on a mat close to the entrance of Carmarthen Market.	<ul style="list-style-type: none"> <li>A new mat was ordered and placed by the entrance.</li> </ul>
4.	A complaint regarding new road signs which had only the English name (Johnstown)	<ul style="list-style-type: none"> <li>New bilingual signage were placed (Tre Ioan / Johnstown)</li> </ul>
5.	A complaint regarding signage at Cwm Environmental recycling site at Nantycaws and that the Welsh is incorrect. The Welsh language Commissioner received a complaint about the signs and started to investigate on 10 May 2016 in accordance with section 71 Welsh Language Measure (Wales) 2011 that the council had failed to comply with Standard 61 and Standard 63. The final Investigation report was received on 21 November 2016.	<ul style="list-style-type: none"> <li>The Commissioner ruled that the Council had not failed to comply with Standard 61 as the sign had been in place before 30 March 2016.</li> <li>The Commissioner ruled that the Council had failed to comply with Standard 63 as the sign was not accurate in terms of meaning and expression.</li> <li>The sign was removed from the recycling site in May 2016 and through an audit, we have ensured that all signs at the 5 Recycling Centres are accurate in terms of meaning and expression.</li> </ul>
6.	A complaint regarding a poll card with the town and county of the complainant's postal address in English only. The Welsh Language Commissioner received the complaint from a member of the public and decided to conduct an	<ul style="list-style-type: none"> <li>Following the start of the investigation, it became apparent that Carmarthenshire County Council was not responsible for creating the poll card. The Returning Officer was responsible for the poll card and not Carmarthenshire County Council.</li> </ul>

	investigation under section 71 of the Welsh Language Measure.	
7.	An investigation was held by the Welsh Language Commissioner into Carmarthenshire County Council's swimming lessons following receiving information from a member of the public to a suspected failure to comply with the Welsh Language Standards. The Council provided information in accordance with the Standards' requirements and following the Commissioner's procedure.	<ul style="list-style-type: none"> <li>• The Commissioner ruled that Carmarthenshire County Council had not failed to comply with Standard 81 on the basis that the Council promotes Welsh medium swimming lessons and advertises them in Welsh.</li> <li>• The Commissioner ruled that Carmarthenshire County Council had failed to comply with Standard 84 on the basis that the Council doesn't offer Welsh medium swimming lessons for certain levels, although the swimming lessons are offered at those levels in English. It is a requirement that an Action Plan is prepared within 40 working days to the date of the final investigation report to show the steps that are being taken to comply with Standard 84 in relation to swimming lessons.</li> <li>• The Commissioner ruled that the Council had not failed to comply with Standard 86 on the basis that the Council had not developed any course in relation to swimming lessons in the period since the imposition date.</li> </ul>
8.	Inaccurate sign on a memorial stone placed in the gardens of Town Hall, Llanelli	<ul style="list-style-type: none"> <li>• Although the Council was not responsible for placing the sign, the sign was on Council's land. The Council worked with Llanelli Memorial Group to ensure the new sign was accurate before placing it on the memorial stone.</li> </ul>

## Appendix 7 – Training opportunities provided in 2016-17

Welsh language Awareness – e-learning package	133
'Croeso i'r Gymraeg' – Level 1 Half day workshop for staff to reach level 1	193
Specialist course for Carers working with older people	4
Mentoring skills course	11
Mynediad (Fast track)	6
Mynediad 1	16
Mynediad 2	14
Mynediad Intensive	5
Sylfaen 1	13
Sylfaen 2	12
Sylfaen Intensive	1
Canolradd 1	2
Canolradd 2	3
Siawns am Sgwrs 3	1
Uwch 1	1
Uwch Intensive	1
Welsh for the family	1
Welsh Catch Up Beginners	10
Improving your Welsh: Spoken A	7
Improving your Welsh: Spoken B	9
Improving your Welsh: Written & Spoken	4
Improving your Welsh: Writing Welsh	10
Training for Language Leaders Environment department	10
<b>TOTAL NUMBER OF LEARNERS</b>	<b>467</b>

## Appendix 8 – Language Skills Audit

No Verbal skills	840	No Written skills	1624
Level 1 Verbal	1474	Level 1 Written	1304
Level 2 Verbal	929	Level 2 Written	803
Level 3 Verbal	682	Level 3 Written	653
Level 4 Verbal	579	Level 4 Written	449
Level 5 Verbal	1009	Level 5 Written	671

- The staff survey has been undertaken in two parts. A Metacompliance survey was launched for all office based staff supplemented by Snap Survey Software and a manual paper based version for operational service areas.
- The survey provided a brief overview of the requirements to record language skills in support of the Councils Language Skills Strategy, Workforce planning requirements and to ensure compliance with the Welsh Language Standards. Employees were invited to self-assess their spoken and written language skills for Welsh and English against the new framework and to identify any developmental requirements/support.
- To date 87% of those employees in scope have responded and data is now available to be uploaded to the Payroll/Human Resources System. A progress report has been sought from departmental co-ordinators and efforts are continuing to achieve a full response from all service areas. Once data is uploaded reports profiling the workforce language skills can be produced to assist with any skills gap analysis.

## EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

### CARMARTHENSHIRE LOCAL DEVELOPMENT PLAN 2006 – 2021 REVIEW REPORT

#### Recommendations / key decisions required:

- To consider the content of the Carmarthenshire Local Development Plan Review Report
- To Authorise the commencement of work on the preparation a full revision of the Carmarthenshire Local Development Plan
- To publish the Carmarthenshire Local Development Plan Review Report
- Grant officers delegated authority to make typographical or factual amendments as necessary to improve the clarity and accuracy of the Review Report.

#### Reasons:

- To comply with statutory obligations in terms of the preparation and progress of the preparation of a Revised Local Development Plan (LDP) for Carmarthenshire in accordance with statutory procedures.
- To ensure the adoption of a revised (replacement) LDP in a timely manner ahead of the expiration of the current LDP.

#### Relevant scrutiny committee to be consulted:

YES Community Scrutiny Committee 14<sup>th</sup> December 2017

Exec Board Decision Required YES

Council Decision Required YES

#### EXECUTIVE BOARD MEMBER PORTFOLIO HOLDER:- Cllr Mair Stephens

Directorate : Environment	Designations :	Tel Nos. 01267 228659
Name of Head of Service:		E Mail Addresses:
Llinos Quelch	Head of Planning	<a href="mailto:LQuelch@carmarthenshire.gov.uk">LQuelch@carmarthenshire.gov.uk</a>
Report Author: Ian Llewelyn	Forward Planning Manager	<a href="mailto:IRLlewelyn@carmarthenshire.gov.uk">IRLlewelyn@carmarthenshire.gov.uk</a>

# EXECUTIVE SUMMARY

## EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

### CARMARTHENSHIRE LOCAL DEVELOPMENT PLAN 2006 – 2021 REVIEW REPORT

#### 1. Brief Summary of Purpose of Report.

The purpose of the report is to seek Council's approval of the Carmarthenshire Local Development Plan (2006 – 2021) Review Report. The production of this report follows resolution of the County Council on the 20<sup>th</sup> September wherein consideration was given to the second LDP Annual Monitoring Report (AMR) and its recommendations.

The Review Report (Appended) sets out the extent of changes required to the LDP and the revision procedure to be followed in preparing a replacement LDP for a plan period up to 31<sup>st</sup> March 2033 (the end of a 15 year plan period that commences on the 1<sup>st</sup> April 2018).

The recommendations of the Review Report, have been informed by the findings of preceding AMRs, liaison (including feedback regarding the implementation of the current LDP), evidence base and ongoing surveys.

In this respect the Review Report concludes and recommends that the 'full revision' procedure in preparing a replacement Local Development Plan (LDP) is followed. In recommending that a 'full revision' of the Plan be undertaken the Review Report highlights the following principle reasons:

- To ensure that a revised plan is adopted ahead of the expiration of the current LDP at the end of 2021;
- To recognise the outcomes of the AMRs, notably where it indicates failures in the delivery of the LDP strategy, the settlement framework and the spatial distribution of growth. In this respect both the level and spatial distribution of growth needs to be considered in order to establish whether the current strategy is the most appropriate for delivering growth up to 31<sup>st</sup> March 2033; and,
- To ensure that the implications of the 2014-based Local Authority Population and Household Sub-National Projections and the significant variance in population change and household requirements which are indicated are robustly considered. There is a need to understand the implications of these revised projections, and to consider them within the context of Carmarthenshire and of job creation, growth and inward investment (including Regeneration through the City Deal). To achieve this will require a review of the strategic approach set out within the LDP.



In addition, contextual changes, amendments in legislation, national policy and a range of plans and strategies, and changes to the evidence base also indicate that certain policies and allocations within the LDP need to be revised. A consequential re-consideration of the LDP's vision, primary aims and objectives is therefore also necessary given the basis for the revision as set out above.

It should be recognised that the Review Report also concludes that many aspects of the current adopted LDP are functioning effectively and delivering as expected. Consequently many elements and components of the current LDP will not require anything other than non-substantive changes.

A copy of the draft Review Report is appended as part of this report. It should be noted that the content of the attached Review Report represents a progressive draft which will be refined and developed as it progresses through reporting to Council in January 2018.

## **2. Background**

The Carmarthenshire Local Development Plan (LDP) was adopted at the meeting of County Council on the 10<sup>th</sup> December 2014. It sets out the Authority's policies and proposals for the future development and use of land, guiding and managing development by providing the foundation for consistent and rational decision making. It also forms a central role in guiding future opportunities for investment and growth.

The LDP's policies and proposals include land-use allocations for different types of development (i.e. housing, employment, retailing, education, open space etc.) as well as criteria for assessing individual proposals. The Plan has a direct effect on the lives of every resident of the County as well as major implications on investment programmes, other plans and strategies, communities and landowners alike. In doing so, it provides a measure of certainty about what kind of development will, and will not, be permitted in particular locations during the Plan period.

## **3. LDP Revision and Review Process**

In accordance with statutory requirements the Council has prepared and published two Annual Monitoring Reports (AMRs) to date. The purpose of each AMR is to assess the extent to which the LDPs strategy, policies and development sites are being delivered. In this respect an AMR forms an important component in ensuring the LDP remains up-to-date.

In order to ensure that there is a regular and comprehensive assessment of whether an LDP remains up-to-date, Councils are required to undertake a full review of their adopted LDP. The intervals for such reviews are not longer than every 4 years from the date of adoption. However, it is also essential that monitoring recognises and responds to any exceptional circumstances which may elicit an early review of the Plan. In this respect, following consideration of the second AMR at the meeting of County Council on the 20<sup>th</sup> September 2017, it was resolved that a review report in respect of the Carmarthenshire LDP be prepared to determine whether a full or partial review of the Plan is necessary and the extent of changes required to the LDP. It also considers the revision procedure to be followed in preparing a replacement plan.

The review report has drawn upon: the content of the published AMRs; updated evidence and

surveys; and, pertinent amendments or issues relating to contextual indicators, including relevant changes to national policy.

#### **4. Review Report and Key Findings**

The Review Report sets out the extent of the changes required to the LDP and the revision procedure to be followed in preparing a replacement plan.

In this respect the report recommends that a 'full revision' of the Plan be undertaken. Such a revision essentially requires the preparation of a replacement Plan similar to that associated with the full preparation of an LDP. Reference will therefore be made to statutory provisions in its preparation and in particular the requirements of the LDP Regulations (Wales) and the provisions of the Local Development Plan Manual (Edition 2) in undertaking its preparation.

The Review Report highlights a number of principle reasons for the review and in concluding that a 'full revision' of the Plan is necessary, these reasons are discussed below.

Firstly to ensure that a revised plan is adopted ahead of the expiration of the current LDP at the end of 2021. Reference should be made to the provisions of the emerging Delivery Agreement and the regulatory procedures set out in legislation. In this respect the projected timetable for preparation of the revised LDP would need to ensure the LDP is adopted before the expiration of the current LDP at the end of 2021.

Secondly to recognise the outcomes of the AMR notably where it indicates failures in the delivery of the LDP strategy, the settlement framework and the spatial distribution of growth. In this respect both the level and spatial distribution of growth needs to be considered in order to establish whether the current Strategy is the most appropriate for delivering growth through the Plan period.

Furthermore the Report recognises the failure to deliver a 5 year housing land supply, as required within PPW and Technical Advice Note 1 within the past four annual Joint Housing Land Supply Studies. Housing permissions granted have not been sufficient to meet the requirements for growth and distribution in accordance with the LDPs strategy. In this respect a gap exists between actual housing completions and the LDP housing requirement. The level of growth and the spatial distribution of that growth will require reconsideration in revising the LDP in order to address the lack of a five year supply.

The need to ensure that the strategy, particularly in terms of spatial distribution of growth and the performance of the tier 2 and 3 settlements requires re-consideration particularly in light of contextual changes around household requirements and any changes to the strategy emerging through the Plan revision process.

There is a need to ensure that the strategy and the identified growth requirements are robust and that the spatial framework, distribution of growth and the allocated sites within the Plan are deliverable.

There will be a need to ensure the implications of the 2014-based Local Authority Population

and Household Projections and the significant variance in population change and household requirements are robustly considered. In this respect there is a need to understand the implications of these revised projections, set them within a Carmarthenshire context and against a context of job creation growth and inward investment requires a review of the strategic approach set out within the LDP.

In addition, contextual changes and changes in the form of legislation, national policy and a range of Plans and strategies and to the evidence base also indicate that certain policies and allocations within the LDP need to be revised. A consequential re-consideration of the LDP's Vision, Primary Aim and Objectives is therefore also necessary given the nature of the other matters raised above.

It should also be recognised that the Review Report also finds that many aspects of the current adopted LDP are functioning effectively and delivering as expected. Consequently many elements and components of the current LDP will not require anything other than non-substantive changes.

## **5. Next Steps: the Review Process and the Revision of the LDP**

The Review Report is being placed before Council for approval of its contents and to commence work on the preparation of the Revised LDP following the full statutory processes associated with a full revision to the Plan.

This process is broadly reflective of the procedure followed in the preparation of the current adopted LDP, and will involve the preparation of a revised Re-deposit Preferred Strategy and Deposit Plan the latter of which will be examined by an independent planning inspector.

It is anticipated that the replacement LDP will be prepared within a four year period; the details of which will be set out in a revised Delivery Agreement which is subject to a separate report also before this meeting for consideration.

The Review Report will be published and will also form part of the documents published at the LDP pre-deposit stage with any comments or observations on its content taken into consideration as part of the pre-deposit Plan (Preferred Strategy).

Note: The Review Report is in draft form and will continue to be developed and refined as it proceeds through the reporting process with reporting to full Council scheduled for 20th January 2018. Following formal approval at the meeting of full Council, the Review Report will be published on the Council website and sent to the Welsh Government. The Review Report will form part of the documents published at the LDP pre-deposit stage. This will allow early engagement as part of the Pre-deposit process associated with the revision of the LDP. It will also form part of the deposit documentation and the submission package.

<b>DETAILED REPORT ATTACHED?</b>	<b>YES</b>
----------------------------------	------------

## IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report :

Signed: L Quelch

Head of Planning

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
<b>YES</b>	<b>YES</b>	<b>YES</b>	<b>YES</b>	<b>NONE</b>	<b>YES</b>	<b>YES</b>

### Policy, Crime & Disorder and Equalities

The AMR in monitoring the implementation of the LDP's policies and provisions builds on the links and strategic compatibility between it and the **Integrated Community Strategy for Carmarthenshire 2012-17**. In this respect the Sustainability Appraisal and Strategic Environmental Assessment (SA/SEA) as components of the LDP, are key factors in the delivery of the outcomes, particularly **Supporting Opportunities for the Building of Economically Viable and Sustainable Communities**. Through land use planning policies, the LDP seeks to promote the principles of sustainability and sustainable development by facilitating the creation of communities and local economies which are more sustainable providing access to local services and facilities and reducing the need to travel.

The integration of sustainability as part of the preparation of the LDP is reflected in the undertaking of a SA/SEA reflecting national and international legislative requirements. The formulation of the revised LDP will closely consider matters of sustainability and will be prepared with the outcomes of the Plan measured in light of the Sustainability Appraisal indicators.

The Review Report recognises the requirements emanating from the Wellbeing of Future Generations Act and the implications for the LDP in general. In this respect the LDP will have full regard to the national legislative provisions and will relate and have regard to the Carmarthenshire Well-being Plan. The LDP will assess compatibility of the LDP and the National and local Well-being Objectives. It is noted that the revised LDP will ensure the requirements emanating from the Act are fully and appropriately considered with the Plan reflective of its duties.

## Legal

The preparation of the LDP reflects the provisions of the Planning and Compulsory Purchase Act 2004 including the requirements of the section 76 of the Act in keeping all matters under review that are expected to affect the development of its area.

The preparation of this Review report is a required statutory report under S69 of the 2004 Planning and Compulsory Purchase Act and/or Reg41 of the LDP Regulations; to conclude on the LDP revision procedure to be followed based on a clear assessment of what has been considered and what needs to change and why, based on evidence.

The preparation of the Delivery Agreement is in accordance with Section 63 of the 2004 Planning and Compulsory Purchase Act. It is also in line with national regulations and guidance in relation to its scope and content.

## Finance

Financial costs to date are covered through the financial provisions in place - including reserves. The Planning Division Budget is unlikely to be able to cover the funding necessary to meet all the statutory requirements to review and prepare a development plan and therefore applications will be made for a growth bid when identified to be necessary. Such bids may cover costs such as additional financial provision will be required to meet the ongoing costs associated with legislative requirements arising from its production, including ICT requirements (see below) evidence gathering and examination costs.

The Delivery Agreement (DA) in making reference to such matters outlines the Council's commitment to prepare and adopt an up-to-date LDP in accordance with the Council's statutory duty. The DA forms a separate CMT report being reported alongside this report on the Review Report.

The identified requirements around the undertaking of a Sustainability Appraisal and Strategic Environmental Assessment as well as a Habitat Regulations Assessment as part of the preparation of the LDP is subject to consideration. In this respect identified reserves may be set aside to meet anticipated costs.

## ICT

Requirements in relation to ICT will seek to utilise existing resources. There will however be additional and revised data management requirements to ensure the plan preparatory process is conducted in a speedy, efficient and transparent manner in accordance with regulatory requirements. This may require a new front facing consultation tool and its integration with back office systems.

## Physical Assets

The review of the LDP will impact on Council land and property holdings through their inclusion or otherwise for potential development purposes. This will have implications on potential disposal and land valuations and consequently capital receipts.

## Staffing Implications

It is anticipated that the review of the LDP be accommodated mainly by utilising the existing staff structure. This will be reviewed subject to the nature and scope of the review. It is proposed to recruit a Support Officer to support and undertake specialist elements in relation to the Sustainability Appraisal and Strategic Environmental Assessment as well as a Habitat Regulations Assessment.

Provision will also be required for a Programme Officer for the Examination into the LDP (anticipated employment for the period 2020/21).

## CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: L Quelch

Head of Planning

### 1. Scrutiny Committee

14<sup>th</sup> December 2017 – Community Scrutiny.

### 2. Local Member(s)

The content of the Review Report will be reported to Council for consideration. Members will be engaged throughout the LDP revision process. The content of the Review Report will be subject to a consultation at subsequent LDP stages. Planning Committee - A briefing/discussion based session has been held with comments informing the content of the Review Report. The LDP Advisory Panel will also have a continual role in the process and will have met on a number of occasions between now and the report being taken to Council in January.

### 3. Community / Town Council

Town/Community Councils(s) will be a specific consultee at statutory stages throughout the LDP revision. The content of the Review Report will be subject to a consultation at subsequent LDP stages (see Delivery Agreement which forms a separate CMT report for details)

### 4. Relevant Partners

A range of partners will be specific and general consultees throughout the LDP revision. The content of the Review Report will be subject to a consultation at subsequent LDP stages (see Delivery Agreement which forms a separate CMT report for details).

### 5. Staff Side Representatives and other Organisations

Internal contributions will be sought throughout the revision process. Internal partners have been engaged and informed elements of the Review Report.

**Section 100D Local Government Act, 1972 – Access to Information  
List of Background Papers used in the preparation of this report:  
THESE ARE DETAILED BELOW**

Title of Document	File Ref No.	Locations that the papers are available for public inspection
Carmarthenshire Local Development Plan		<a href="http://www.carmarthenshire.gov.wales/home/residents/planning/policies-development-plans/local-development-plan/">http://www.carmarthenshire.gov.wales/home/residents/planning/policies-development-plans/local-development-plan/</a>
Supplementary Planning Guidance		<a href="http://www.carmarthenshire.gov.wales/home/residents/planning/policies-development-plans/supplementary-planning-guidance/#.V06h-JwrKUk">http://www.carmarthenshire.gov.wales/home/residents/planning/policies-development-plans/supplementary-planning-guidance/#.V06h-JwrKUk</a>
Annual Monitoring Report 2015/16		<a href="http://www.carmarthenshire.gov.wales/media/1643860/Annual-monitoring-report-201516-AMR-Document-for-web.pdf">http://www.carmarthenshire.gov.wales/media/1643860/Annual-monitoring-report-201516-AMR-Document-for-web.pdf</a>
Annual Monitoring Report 2016/17		<a href="http://www.carmarthenshire.gov.wales/media/2172900/amr-16-17-eng.pdf">http://www.carmarthenshire.gov.wales/media/2172900/amr-16-17-eng.pdf</a>

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## **1. Introduction**

The provisions of the Planning and Compulsory Purchase Act 2004 and the Local Development Plan (LDP) Regulations 2005, places a requirement on Carmarthenshire County Council as the Local Planning Authority to prepare a Local Development Plan for its administrative area<sup>1</sup>.

The Carmarthenshire Local Development Plan (LDP) was adopted at the meeting of County Council on the 10<sup>th</sup> December 2014. It sets out the Authority's policies and proposals for the future development and use of land, guiding and controlling development by providing the foundation for consistent and rational decision making. It also forms a central role in guiding future opportunities for investment and growth.

The LDP's policies and proposals include land-use allocations for different types of development (i.e. housing, employment, retailing, education, open space etc.) as well as criteria for assessing individual proposals.

The Plan has a direct effect on the lives of every resident of the County as well as major implications on investment programmes, other plans and strategies, communities and landowners alike. In doing so, it provides a measure of certainty about what kind of development will, and will not, be permitted in particular locations during the Plan period.

## **2. Requirement for LDP Monitoring and Review**

The Planning and Compulsory Purchase Act 2004 (The Act) requires each LPA to prepare an Annual Monitoring Report (AMR) on its LDP following adoption, and to keep all matters that are expected to affect the development of its area under review. In addition, under section 76 of the Act, the Council has a duty to produce information on these matters in the form of an AMR for submission to the Welsh Government (WG) each year following the Plan's adoption.

The undertaking of such monitoring is essential in ensuring that an LDP is kept up-to-date. In this respect, and to ensure that there is a regular and comprehensive assessment of whether plans remain up to date, or whether changes are needed, the LPA is required to

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<sup>1</sup> The Plan area excludes the part of the County contained within the Brecon Beacons National Park. The National Park Authority should be contacted in respect of the development plan and development proposals in that area.

undertake a full review of its LDP at intervals not longer than every 4 years from its initial adoption. It is also essential that monitoring recognises and responds to any exceptional circumstances which may elicit an early review of the Plan.

Any such review should draw upon:

- the content of the published AMRs;
- updated evidence and survey; and,
- pertinent contextual indicators, including relevant changes to national policy.

### **3. Aims of this Review Report**

Whilst the LPA is only required to commence a full review of its LDP at intervals not longer than every 4 years from the Plan's initial adoption, it may as outlined above, respond to exceptional circumstances where they may elicit an early review of the Plan. In this respect, at its meeting on the 20<sup>th</sup> September 2017, Council resolved to respond to the conclusions of the second AMR (2016/17) by agreeing to the production of a Review Report into the LDP.

This Review Report consequently sets out areas where the current LDP is delivering and performing well, in addition to those areas where changes may be required. It will also consider issues and the implications in respect of the LDP strategy, strategic and specific policies, along with spatial and site specific matters. It should be noted that it is not the purpose of the Review Report to detail any changes that may be made to the Plan. It will not, and does not pre-empt the outcome of the revised Plan and its preparatory process.

This Review Report will set out and consider the evidence base by summarising the outputs from the published AMRs and any evidence. It will also consider pertinent contextual indicators, including relevant legislative changes, national, regional and local policies, guidance and strategies.

In concluding that a full revision of the LDP is required, this report has reference to future procedures which will be required in undertaking a revision of the LDP. Reference is made to the processes set down within statutory regulations, and the need to ensure that the Plan meets the required tests of soundness.<sup>2</sup>

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<sup>2</sup> To be adopted, a Local Development Plan must be determined 'sound' by the examination Inspector (Section 64 of the 2004 Planning and Compulsory Purchase Act). Tests of soundness and checks are identified in Planning Policy Wales Edition 8, January 2016, Chapter 2 and the Local Development Plan Manual Chapter 8. <http://gov.wales/docs/desh/publications/151007local-development-plan-manual-edition-2-en.pdf>

## 4. Preparing this Report

In developing this Review report, the following inputs and considerations were taken into account:

- Review of latest and emerging evidence, for example the outcome of the Joint Housing Land Availability Studies;
- Content of the LDP's Annual Monitoring Reports;
- Thematic policy and steering groups including those centred on evaluating and understanding aspects around the effectiveness of the Plan's delivery;
- Reviewing the National Planning Policy and national legislation context;
- Member engagement;
- Engagement and input from stakeholders; and
- Reviewing contextual changes at a regional and local level, including the emergence of new and revised plans and strategies.

## 5. Annual Monitoring Report Outcomes and Indicators

As a central component of monitoring and the implementation of an LDP, the AMR considers how the Plan's strategic and general policies are performing against the identified key monitoring targets, and crucially whether the LDP strategy and objectives are being delivered. In this respect, the outcomes of both AMRs are key evidential elements for a Review Report to draw upon.

The LDP monitoring framework identifies 44 Monitoring Indicators, each of which measure the LDP's delivery and implementation against a series of policy targets. The AMRs utilise a traffic light system for monitoring its policies (see below). This allows a readily available visual interpretation of their performance. The following table represents a visual extract of the AMR indicators and its use should be qualified through an understanding of the content of the AMR and any accompanying explanatory narrative.

Policy target is being achieved or exceeded.	
Policy target not currently being achieved as anticipated but it does not lead to concerns over the implementation of the policy.	
Policy target is not being achieved as anticipated with resultant concerns over implementation of policy.	
No conclusion to be drawn – limited data available.	

## Spatial Strategy

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 - 31 March 2016	Performance 1 April 2016 – 31 March 2017
% of overall housing permissions which are on allocated sites.	85% of all housing developments permitted every year should be located on allocated sites.	The proportion of dwellings permitted on allocated sites deviates 20% +/- the identified target.	54% of all housing developments permitted were located on allocated sites.	38.3% of all housing developments permitted were located on allocated sites.

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 – 31 March 2016	Performance 1 April 2016 – 31 March 2017	
% of overall housing permissions which are on allocated sites.	85% of all housing developments permitted every year should be located on allocated sites.	The proportion of dwellings permitted on allocated sites deviates 20% +/- the identified target.	Growth Areas Target 62%	Actual 67.3%	Actual 43.8%
			Service Centres 10%	3.6%	9.5%
			Local Services Centres 12%	17.1%	0.7%
			Sustainable Communities 15%	15.2%	46%

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 - 31 March 2016	Performance 1 April 2016 – 31 March 2017
Permissions for, or availability of on site or related infrastructure which facilitates delivery of strategic employment sites (ha) as listed in Policy SP4.	By 2018, all the strategic employment sites are considered to be immediately available or available in the short term i.e. the sites either benefit from planning consent or the availability of on site or related infrastructure to facilitate development.	By 2018 all the strategic employment sites are not immediately available or available in the short term.		

## Sustainable Development

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 - 31 March 2016	Performance 1 April 2016 – 31 March 2017
Permissions for residential development on previously developed housing allocations.	29% of dwellings permitted on allocated sites should be on previously developed allocations.  Information gathered on an annual basis. The annual monitoring figure noted above takes into consideration the number of dwellings already completed on	Less than 29% (with an additional variance of 20% under the target figure to allow for flexibility) of dwellings are permitted through housing allocations on previously developed land over a period of two years.	10% of dwellings on housing allocations have been permitted on previously developed land.	19.7% of dwellings on housing allocations have been permitted on previously developed land.

	previously developed allocated sites.			
Amount of highly vulnerable development (by TAN15 paragraph 5.1 development category) permitted in C1 and C2 flood risk zones not meeting all TAN15 tests (paragraph 6.2 i-v).	No applications permitted for highly vulnerable development in C1 and C2 flood risk zone contrary to NRW advice.	1 application permitted for highly vulnerable development in C1 or C2 flood risk zone contrary to NRW advice. Note: The LPA will be required to refer all applications which they are minded to approve for the development of emergency services or highly vulnerable development, where the whole of the land where the development is proposed to be located, is within C2 flood zone, to the Welsh Ministers. In the case of residential development, the threshold for notifying the Welsh Ministers is set at 10 or more dwellings, including flats.	No applications were permitted for highly vulnerable development in the C1 or C2 flood risk zone contrary to NRW advice.	No applications were permitted for highly vulnerable development in the C1 or C2 flood risk zone contrary to NRW advice.
Production of SPG on SUDS.		SPG not produced within 5 months of adopting the Plan.	SPG produced.	SPG adopted

## Housing

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 - 31 March 2016	Performance 1 April 2016 - 31 March 2017
The housing land supply taken from the current Housing Land Availability Study (TAN1).	Maintain a minimum 5 year housing land supply.	Housing land supply falling below the 5 year requirement.	4.1 years	4.2 years
The number of dwellings permitted annually.	1,405 dwellings permitted annually.	20% +/- 2,810 dwellings permitted in the first two years after adopting the Plan.	1,483 dwellings.	584 dwellings
The number of dwellings permitted on windfall sites.	186 dwellings permitted annually on windfall sites.	20% +/- 372 dwellings permitted on windfall sites in the first 2 years after adopting the Plan.	784 dwellings.	407 dwellings
The number of Gypsy and Traveller pitches required.	Identify a Gypsy and Traveller site to meet identified need in the Llanelli area by 2016. Provide a Gypsy and Traveller site to meet identified need in the Llanelli area by 2017.	Failure to identify a site by 2016. Failure to provide a site by 2017.		
The annual number of authorised and unauthorised Gypsy and Traveller caravans in the County.	No Gypsy and Traveller site recorded in one settlement for 3 consecutive years.	1 unauthorised Gypsy and Traveller site recorded in one settlement for 3 consecutive years.		
The number of affordable dwellings permitted.	226 affordable dwellings permitted in the first year of the Plan after adoption.	20% +/- 452 affordable dwellings not permitted in the first 2 years of the Plan after adoption.	217.3 units.	101 units

	452 dwellings permitted in the first 2 years of the plan after adoption.			
Affordable Housing percentage target in Policy AH1.	Target to reflect economic circumstances.	Should average house prices increase by 5% above the base of 2013 levels sustained over 2 quarters then the Authority may conduct additional viability testing and modify the targets established in Policy AH1.		
The number of affordable dwellings permitted on housing allocations per sub-market area.	The proportion of affordable dwellings permitted on residential allocations should be in accordance with Policy AH1 as follows:	The proportion of affordable dwellings permitted on residential allocations not in accordance with Policy AH1.		
	<ul style="list-style-type: none"> <li>Llandovery, Llandeilo and North East Carmarthenshire – 30%</li> </ul>		No housing allocations within this submarket area were approved	No housing allocations within this submarket area have been approved.
	<ul style="list-style-type: none"> <li>St Clears and Rural Hinterland – 30%</li> </ul>	<ul style="list-style-type: none"> <li>W/31130 – Land to the rear of Caeffynnon, Bancyfelin.</li> </ul>	Two allocations approved. One at 14.4% affordable and the other a commuted sum payment	2 units from 13 to be affordable. Equates to 15.3%
	<ul style="list-style-type: none"> <li>Carmarthen and Rural 30%</li> </ul>	<ul style="list-style-type: none"> <li>W/26987 – Land opposite village Hall, Llanddarog</li> <li>W/33934 – Former MOD land and adjoining Wood End, Llanmiloe, Pendine</li> </ul>	Two allocations were approved. One at 14.28% and the other at 20%	<ul style="list-style-type: none"> <li>20% of units to be affordable. Indicative 16 units resulting in 3.2 affordable units.</li> <li>4 affordables granted reserved matters, however it is part of a much larger allocation with the affordable units to be built following the completion of the 14 open market unit on the site. The remainder of the site does not have detailed permission.</li> </ul>
	Carmarthen West (20%)		One allocation was granted planning permission with 12% affordable housing targets.	No permissions
	<ul style="list-style-type: none"> <li>Newcastle Emlyn and Northern Rural Area – 20%</li> </ul>		Two housing allocations were granted planning permission. One at 14.28% and the other at 20%.	No permissions
	<ul style="list-style-type: none"> <li>Kidwelly, Burry Port, Pembrey and Lower Gwendraeth Valley – 20%</li> </ul>		Commuted Sum payments permitted.	No permissions
	<ul style="list-style-type: none"> <li>Llanelli – 20%</li> </ul>	<ul style="list-style-type: none"> <li>S/33659. Land at Harddfán, Bryn, Llanelli</li> </ul>	Outline permission granted at the 20% target for GA2/h45 and h46.	Outline planning permission for approximately 6 dwellings. Affordable Housing figure set at 20%.
	<ul style="list-style-type: none"> <li>Ammanford / Cross Hands and Amman Valley – 10%</li> </ul>			No permissions

## Economy and Employment

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 - 31 March 2016	Performance 1 April 2016 – 31 March 2017
<p>Permissions granted for development on employment land listed in Policy SP7.</p> <p>Permissions for, or availability of, on site or related infrastructure which facilitates delivery of employment sites (ha) as listed in Policy SP7.</p>	<p>25% of employment land allocated by Policy SP7 either attains planning permission or is available for development within the first 2 years of the Plan after adoption.</p> <p>For the purposes of monitoring employment land, 'available' shall be taken to indicate that the sites either benefit from planning consent or the availability of on site or related infrastructure to facilitate development.</p>	<p>Less than 25% of employment land allocated by Policy SP7, with an additional variance of 20% under the target figure to allow for flexibility, is permitted or available within 2 years of adoption. Annual narrative to describe progress towards delivery.</p>	90% of the annual/interim monitoring target has been met.	98% of the annual/interim monitoring target has been met.
Production of SPG.		SPG not produced within 9 months of adopting the Plan.	SPG produced.	SPG adopted

## Retail

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 - 31 March 2016	Performance 1 April 2016 – 31 March 2017
Annual vacancy rates of commercial properties within the Primary and Secondary Retail Frontage areas of the Growth Area towns.	Vacancy rates of commercial properties in the town centres of Carmarthen, Ammanford and Llanelli.	Monitor for information.		
Proportion of units in A1 retail use located in the Primary Retail Frontage as designated by Policy RT2.	65% or more of units within the Primary Retail Frontage are in A1 use.	Less than 65% of units within the Primary Retail Frontage are within A1 use with an additional variance of 10% under the target figure to allow for flexibility.		

## Transport

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 - 31 March 2016	Performance 1 April 2016 – 31 March 2017
Progress towards implementing the road schemes identified in Policy SP9 in accordance with delivery timetables.	Implementation in accordance with delivery timetables.	The road schemes identified in Policy SP9 are not delivered in accordance with delivery timetables.	Progress has been made on the implementation of the schemes listed in Policy SP9 which are within the control of the Local Authority.	Progress has been made on the implementation of the schemes listed in Policy SP9 which are within the control of the Local Authority.
Progress towards implementing the cycle schemes identified in Policy TR4.	Implementation in accordance with delivery timetables by 2021.	Non implementation of the cycle schemes identified in the Local Transport Plan and forthcoming Local Transport Plan. If finance has not been secured for a project by first plan review.		

## Minerals

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 - 31 March 2016	Performance 1 April 2016 – 31 March 2017
Aggregates landbank for Carmarthenshire County Council.	To maintain a minimum 10 year landbank of hard rock.	Less than 10 years hard rock landbank.	The current hard rock landbank for Carmarthenshire is 55 years.	The current hard rock landbank for Carmarthenshire is at least 68 years.
Combined aggregates landbank for Carmarthenshire County Council with neighbouring authorities of PCC, PCNP & Ceredigion CC.	To maintain a minimum 7 year landbank of sand and gravel.	Less than 7 years sand and gravel landbank.	The current combined S&G Landbank for Carms CC, Ceredigion CC, PCC & PCNPA is 18 years.	The current combined S&G Landbank for Carms CC, Ceredigion CC, PCC & PCNPA is at least 17 years.
Number of planning permissions for permanent, sterilising development permitted within a mineral buffer zone.	No permanent, sterilising development will be permitted within a mineral buffer zone contrary to Policy MPP2.	5 permanent, sterilising developments permitted within a mineral buffer zone contrary to Policy MPP2 over 3 consecutive years.	No sites contrary to Policy MPP2.	No sites contrary to Policy MPP2.
Number of planning permissions for permanent, sterilising development permitted within a mineral safeguarding area.	No permanent, sterilising development will be permitted within a mineral buffer zone contrary to Policy MPP3.	5 permanent, sterilising developments permitted within a mineral buffer zone contrary to Policy MPP3 over 3 consecutive years.	No sites contrary to Policy MPP3.	No sites contrary to Policy MPP3.
Number of prohibition orders issued on dormant sites.	Ensure that those dormant sites deemed not likely to be re-worked in the future (as part of the annual review) are served with prohibition orders within 12 months.	LPA fails to serve prohibition orders on sites that are deemed not likely to be re-worked in the future.		

## Renewable Energy

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 - 31 March 2016	Performance 1 April 2016 – 31 March 2017
Permitted capacity of renewable electricity and heat projects within the County (by MW).	Annual increase in the permitted capacity of renewable electricity and heat projects through the Plan period.	Monitor for information purposes.	45.79 MW of renewable energy has been permitted during the monitoring period.	17.306 MW of renewable energy has been permitted during the monitoring period.
Production of SPG.		SPG not produced within 9 months of adopting Plan.		



## Waste Management

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 - 31 March 2016	Performance 1 April 2016 – 31 March 2017
Production of SPG.		SPG not produced within 5 months of adopting Plan.		

## Environmental Qualities – The Built and Natural Environment

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 - 31 March 2016	Performance 1 April 2016 – 31 March 2017
Hectares of suitable habitat in management.	An ongoing increase in provision of suitable habitat in management.	No increase in any given year.	4.24ha of additional provision of suitable habitat for the Marsh Fritillary Butterfly is being managed within the Caeau Mynydd Mawr project. (this figure was net of NRW managed designated sites)	A further additional 6.56ha of additional provision of suitable habitat for the Marsh Fritillary Butterfly is being managed within the Caeau Mynydd Mawr project (this figure is net of NRW managed designated sites). When taken alongside AMR 1 – the total increase over the Plan period to 31/3/17 is 10.8ha.
Number of planning applications granted which have an adverse effect on the integrity of a Natura 2000 site.	No planning applications approved contrary to the advice of NRW.	1 planning permission granted by the Local Planning Authority contrary to the advice of NRW.	No planning applications have been approved which affects the integrity of Natura 2000 sites during the AMR period.	No planning applications have been approved which affects the integrity of Natura 2000 sites during the AMR period.
Number of planning applications granted which may potentially adversely affect the features of a protected site for nature conservation.	No planning applications approved contrary to the advice of NRW or the authority's ecologist.	1 planning permission granted by the Local Planning Authority contrary to the advice of NRW or the authority's ecologist.	No planning applications were approved contrary to the advice of NRW or the Council's ecologist.	
Number of planning applications granted which results in detriment to the favourable conservation status of European protected species or significant harm to species protected by other statute.	No planning applications approved contrary to the advice of NRW or the authority's ecologist.	1 planning permission granted by the Local Planning Authority contrary to the advice of NRW or the authority's ecologist.	No planning applications were approved contrary to the advice of NRW or the Council's ecologist.	No planning applications were approved contrary to the advice of NRW or the Council's ecologist.
Number of planning applications permitted with the potential to adversely affect a Special Landscape Area.	No planning applications approved contrary to the advice of NRW or the authority's landscape officer.	5 planning permissions granted by the Local Planning Authority contrary to the advice of NRW or the authority's landscape officer over a period of 3 consecutive years.	No applications approved contrary to the advice of NRW or the Council's Landscape Officer.	No applications approved contrary to the advice of NRW or the Council's Landscape Officer.
Occasions when development permitted would have an adverse impact on a Listed Building; Conservation Area; Site / Area of Archaeological Significance; or Historic Landscape, Park and Garden or their setting.	No planning applications approved where there is an outstanding objection from the Council's Conservation Officer, Cadw or DAT (Dyfed Archaeological Trust).	5 planning permissions granted by the Local Planning Authority where there is an outstanding objection from the Council's Conservation Officer, Cadw or DAT over a period of 3 consecutive years.	Target was achieved in the first AMR period.	Target was achieved in the second AMR period.
Production of SPG.		SPG not produced within 7 months of adopting the Plan.	SPG produced.	SPG adopted.

Production of SPG.		SPG not produced within 7 months of adopting the Plan.	SPG produced.	SPG adopted.
Production of SPG.		SPG not produced within 12 months of adopting the Plan (continually monitored pending ongoing designations).	SPG produced.	SPG produced.
Production of SPG on Design.		SPG not produced within 5 months of adopting the Plan.	SPG produced.	SPG adopted
Production of SPG on Locally Important Buildings.		SPG not produced within 15 months of adopting the Plan.	SPG not produced during the first AMR.	SPG not produced during the second AMR.
Production of SPG on Trees, Landscaping and Development.		SPG not produced within 15 months of adopting the Plan.	SPG not produced during the AMR.	SPG not produced during the second AMR.

## Recreation and Community Facilities

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 - 31 March 2016	Performance 1 April 2016 – 31 March 2017
Number of applications approved for the provision of new community facilities.  Number of applications approved which would result in the loss of an existing community facility.	No applications approved contrary to Policy SP16 and RT8.	1 application approved contrary to Policy SP16 and RT8.	No applications approved contrary to the provisions of Policies SP16 and RT8.	No applications approved contrary to the provisions of Policies SP16 and RT8.
Amount of open space lost to development (ha)	No open space should be lost to development except where in accordance with Policy REC1.	Open space is lost to development contrary to the provisions of Policy REC1 which results in a net loss of open space.	No applications approved contrary to the provisions of Policy REC 1.	No applications approved contrary to the provisions of Policy REC 1.
Production of SPG.		SPG not produced within 15 months of adopting the Plan.	SPG produced.	SPG Adopted

## The Welsh Language

Indicator	Annual / Interim Monitoring Target	Assessment trigger	Performance 1 April 2015 - 31 March 2016	Performance 1 April 2016 – 31 March 2017
Planning permissions granted for residential developments of five or more dwellings in Sustainable Communities and planning permissions granted for residential developments of ten or more dwellings in Growth Areas, Service Centres and Local Service Centres.	All planning permissions granted for residential developments of five or more dwellings in Sustainable Communities and planning permissions granted for residential developments of ten or more dwellings in Growth Areas, Service Centres and Local Service Centres to include a requirement to phase development, in accordance with policy on the Welsh Language and the guidance contained within SPG on The Welsh Language.	One planning consent granted for residential development of five or more dwellings in a Sustainable Community or one planning consent granted for residential development of ten or more dwellings in a Growth Area, Service Centre or Local Service Centre which fails to require that the development is phased contrary to the LDP's policy on the Welsh Language and the guidance contained within SPG on The Welsh Language.	No planning permissions contrary to LDP Policy SP18.	No planning permissions contrary to LDP Policy SP18.

## **6. Key AMR Findings**

### **Housing Land Supply**

The 2017 Joint Housing Land Availability Study (JHLAS) is the fourth Study in succession where the housing land supply for the Plan area has been below the 5 year requirement identified within Technical Advice Note 1. This is reflected in AMR1 and AMR2 which shows 4.1 and 4.2 years supply respectively.

The 2017 JHLAS reported the completion of 426 new homes on large sites during the monitoring period. This represents a drop from the 516 homes completed during AMR1.

### **Residential Permissions**

The second AMR has shown a decrease in the number of dwellings permitted annually. The monitoring period for the second AMR stated that 584 dwellings were permitted as opposed to the 1,483 dwellings in AMR1. Of the total permitted dwellings during AMR2, 374 were on sites of 5 or more dwellings whilst the remainder were on small sites. The distribution of these planning permissions showed a significant focus on Growth Areas (Tier 1) and Sustainable Communities (Tier 4) with 43.8% and 46% respectively.

### **Affordable Housing Permissions**

In relation to affordable housing, 101 dwellings have been permitted during the AMR2 period, as opposed to 217 affordable dwellings permitted within AMR1.

### **Employment Sites**

The monitoring outcomes demonstrated progress in the delivery of employment sites allocated within the LDP. A combined total of 27.35ha of employment land has been granted planning permission.

### **Retail**

The vacancy rates within the identified Retail Frontages of the three Principal Retail Centres of Carmarthen, Llanelli and Ammanford indicate continued success in meeting the policy's monitoring target. It is clear however, that each centre has distinctly different characteristic and challenges, and any Plan must remain responsive.

### **Gypsy and Traveller Sites**

As a result of the requirement of the Housing (Wales) Act 2014, a Gypsy and Traveller Accommodation Assessment (GTAA) has been undertaken to identify whether there is a need for Gypsy and Traveller sites. The Local Authority received confirmation from the Welsh Minister that the content of the GTAA was accepted on 28th March 2017. The GTAA will now need to be considered and signed off by the Authority. Its outcome will have a bearing on future policy requirements, and will be a matter for further consideration within this report.

### **Welsh Language**

In relation to the Welsh Language policies, the AMRs have not raised any issues in relation to the determination of applications within linguistic sensitive areas. Whilst this remains a positive monitoring outcome, the recent publication of the latest Technical Advice Note (TAN) 20: Planning and the Welsh language will, as with all changes to national policy, require a reassessment of policy provisions.

## **7. Joint LDPs and Joint Working**

The Planning (Wales) Act 2015 gives power to Welsh Ministers to direct local authorities to prepare joint LDPs. In preparing this Review Report, and in considering options for the preparation of a revised LDP, the Council recognises the prospective value that may be offered through the preparation of joint LDPs with neighbouring authorities. Careful consideration needs to be given to the timing of any joint LDP, this reflects the continually evolving regional context and local government re-organisation. This could potentially impact on its preparation, and the ability of the respective authorities to produce adopted Plans before the expiration date of current LDPs.

As part of the process of preparing this Review Report, the advantages and disadvantages of preparing a joint revised/replacement Plan with one or more neighbouring local planning authorities has been considered and is set out below.

- In considering the position of each authority and their respective LDPs, it is clear that both the City and County of Swansea and Neath Port Talbot are incompatible by virtue of their timetables for Plan preparation and review. In this respect, Swansea at this time are yet to have an adopted LDP and are approaching examination, whilst Neath Port Talbot have a recently adopted Plan. As such the review timing is not consistent with that of Carmarthenshire.

- Powys County Council also have compatibility issues in relation to the timing of their Plan, with an Inspector's Report anticipated towards the end of this year. This coupled with limited shared relationship would currently preclude any joint arrangement.
- Whilst covering part of the County, the Brecon Beacons National Park Authority is not considered a viable option in order to prepare a joint plan. This reflects not only that a relatively small part of their geographical area covers Carmarthenshire, but also that it would logistically require potential policy integration across a number of other Council areas.
- Whilst Ceredigion has similarities to parts of Carmarthenshire in terms of the rural context, there is a divergence in terms of the authorities' economic collaborations, particularly in terms of the City Deal.
- Similarly, Pembrokeshire County Council has significant differences in the economic and cultural nature that would make a joint plan potentially more complicated and lengthy to deliver. These include differences in economic drivers, Welsh language levels in communities, differences in the role of tourism, the particular relationship of Pembrokeshire to the National Park, and the economic base of the different areas. This, together with the additional delay likely in developing and implementing a joint working arrangements, it is considered to outweigh any advantages of preparing a joint LDP.

It is however clear that putting governance and compatibility issues aside, in the longer term a joint Plan between the three authorities and the Pembrokeshire Coast National Park Authority is a possibility. However this would be best considered once the revised LDPs of the respective authorities come up for review, allowing a forward programme of integration and collective working to be established in a period leading up to their review timetables.

Given the considerations above, the most effective focus and use of resources would be to build on joint working opportunities on cross boundary issues and key areas of evidence. Such areas of work include Minerals and Waste, and the potential for a Larger than Local Employment Survey. Consequently, in assessing the potential for the preparation of joint plans, it is also worth recognising that the south west Wales region has traditionally had a

strong relationship based on shared experiences, and where appropriate, feasible joint working. Irrespective of any potential joint LDPs this model would still form a robust basis for cross border and regional working. In this respect it is proposed that the authorities will where appropriate, work closely to prepare joint and shared evidence, including potential Statements of Common Ground (SoCG) where shared interests exist.

## 8. Conclusion

In concluding that a revision of the LDP is required the identification of the appropriate process should be established. In this respect the options open relate to a short form revision, or a full revision of the Plan. Having reference to the reasons for preparing a revised LDP below, it is clear that the scale and implications of the issues highlighted are such that these can only be accommodated through a full revision process. This would ensure that in developing a plan to replace the current LDP that it is able to have full regard to the issues whilst undergoing due scrutiny and engagement.

- The review should commence to ensure that a revised plan which replaces the current LDP is adopted ahead of its expiration at the end of 2021;
- The findings of the AMRs identify areas where the Plan is failing to deliver in the manner anticipated. In this respect, the outcomes of the AMR highlights the aspects of the Plan which have a fundamental impact on the delivery of the LDP strategy;
- There is a need to understand the implications of the 2014-based Local Authority population and Household Projections which identify a significant variance in population change and household requirements from that which formed the basis for the LDP. There is a need to understand the implications of these revised projections, within a Carmarthenshire context, through considering factors such as job creation, growth and inward investment. This will require a review of the strategic approach set out within the LDP.

The Authority is preparing a Delivery Agreement (DA) in relation to a revised LDP. This will set out the timetable for the preparation of the Plan, together with the Community Engagement Scheme (CIS) detailing when, and how the Council will consult on its preparation and with whom.

## 9. Consideration of Current LDP and Potential Revisions

The following section considers and details how the various components of the LDP are performing. In doing so, it considers the implications in light of the potential impact of the LDP strategy and the tests of soundness<sup>3</sup>. In this respect it will identify issues that need to be addressed. It is not the purpose of the following section, or indeed this report to identify specific changes to the Plan, but rather to identify the areas where a revision or change is likely to be necessary. It sets out clearly what has been considered, where changes are required, and what needs to change and why<sup>4</sup>. It should be noted that the following are not exhaustive, and that potential changes may emerge as the Plan progresses through the preparatory process. Reference is also made to Appendix 1 which identifies each policy, with a brief discussion in relation to its potential for change.

- **Key Issues, Vision and Strategic Objectives**

### Context

The key issues and objectives developed in respect of the LDP sought to provide a context and appreciation of how national and regional issues, policies and strategies related to the LDP, and its formulation and its deliverability apply. Similarly along with engagement, background evidence contributed to the identification and understanding of local issues. How these issues informed and translated into the LDP Vision and its strategic objectives was essential in this regard.

In preparing a revised LDP, it is accepted that a re-evaluation of the issues which inform the Plan's Vision and Strategic Objectives is necessary if the Plan, is to deliver a strategy for the County that will remain relevant up until 2033. The base date of the revised plan will begin in 1<sup>st</sup> April 2018, to reflect the prevalence of evidence being produced at this point. Consequently, the end of the plan period will be 31<sup>st</sup> March 2033. This re-assessment will continue to reflect the partnership approach exhibited through the preparation of the current LDP, with the Key Stakeholder Forum and its cross sector members performing a central role to realise the Vision and Strategy.

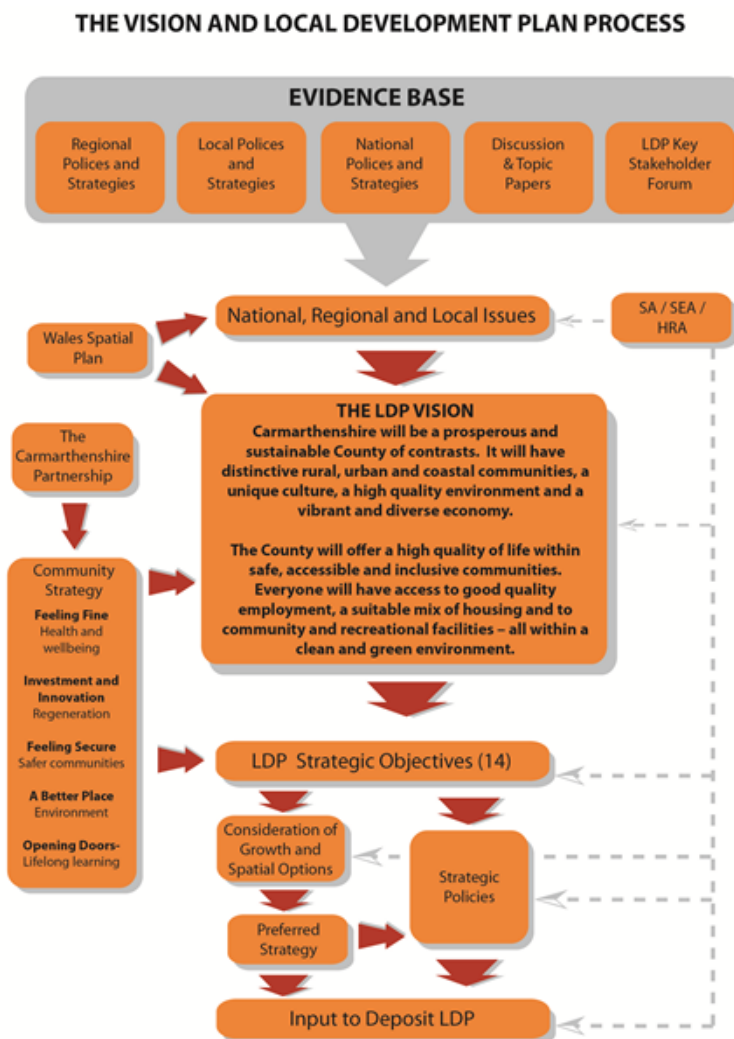
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<sup>3</sup> Tests of soundness and checks are identified in Planning Policy Wales Edition 8, January 2016, Chapter 2 and the Local Development Plan Manual Chapter 8. <http://gov.wales/docs/desh/publications/151007local-development-plan-manual-edition-2-en.pdf>

<sup>4</sup> Local Development Plan Manual 2 – para 10.1.5



Whilst the LDP and its vision is compatible with, and has regard to the Carmarthenshire Integrated Community Strategy (ICS), there were notable differences. The LDP vision differed from the ICS and its mission statement as the latter lacked clear spatial relevance. Nevertheless, its importance was recognised, and regard was had to content of the ICS when formulating the Vision for the LDP. Its role, along with those of other inputs in informing the current LDP Vision and Objectives is captured within the following diagram.



The current LDP sets out 14 strategic objectives which are statements of a condition, or situation which the authority aims to achieve. These reflect and relate to the Vision and issues identified within the Plan, and are crucial in ensuring that the Plan’s Vision is deliverable.



Whilst the compatibility between the LDP's Vision and the ICS is robust, critical changes in the national and local context, notably in relation to preparation of the Carmarthenshire Local Well-being Plan: The Carmarthenshire We Want – 2018 - 2023 (LWP), will require some revision to the LDP. This requirement of the Well-being of Future Generations Act (2015) will need to be integral to aspects of the LDP's revision, reflective of the duty placed on local authorities.

The Act requires public bodies, including local authorities, to carry out sustainable development and to set objectives which maximise its contribution to achieving each of the seven well-being goals. Each public body must take all reasonable steps in exercising its function to meet those objectives. The Act also establishes Public Service Boards (PSB) for each local authority area in Wales who must improve economic, social, environmental and cultural well-being of its area by working to achieve the well-being goals.

Following a period of engagement and consultation the Council published the Carmarthenshire Well-being Assessment in March 2017. The Assessment looked at the state of economic, social, environmental and cultural wellbeing in Carmarthenshire through different life stages, and provides a summary of the key findings. The findings of this assessment form the basis of the objectives and actions within the Carmarthenshire LWP.

The PSB must publish a Well-being plan which sets out its local objectives to improving the economic, social, environmental and cultural well-being of the County and the steps it proposes to take to meet them. Although in its formulative stages, the first Carmarthenshire LWP has been developed for the period 2018 – 2023, with the objectives and actions identified by looking at delivery on a longer term basis of up to 20 years. A review of the emerging well-being objectives at a local and national level against the LDP and its strategic objectives is appended to AMR2, and will form part of an iterative evaluation of their impact and the potential for consequential change.

The Authority will in light of the above and other contextual indicators, be they the emergence of revised plans and strategies, or legislative changes, will be required to ensure they are adequately reflected in any revised and relevant set of issues, Vision and Objectives. Whilst many of the issues and elements of the objectives may remain relevant, it is essential for the Plan in moving forward that they, remain responsive to the changing context. It is also clear that in undertaking some of the other outcomes highlighted within this review report, further iterations in terms of the strategic components around the issues, Vision and Objectives will be inevitable. In this respect, changes in growth requirements, or

how the role and function of settlements is manifested within the preferred strategy will have a direct bearing on the shape of the Vision.

### LDP Strategic Implications

Failure to revise and develop the Issues, Vision and Objectives will have a direct impact on the formulation of a deliverable strategy. In this respect, the relationship between these early and formulative stages and the subsequent Plan making stages, to develop a LDP strategy is essential. The LDP strategy will be directly influenced by any changes in direction from the Vision and Objectives set out within the current adopted LDP.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

- **LDP Strategy**

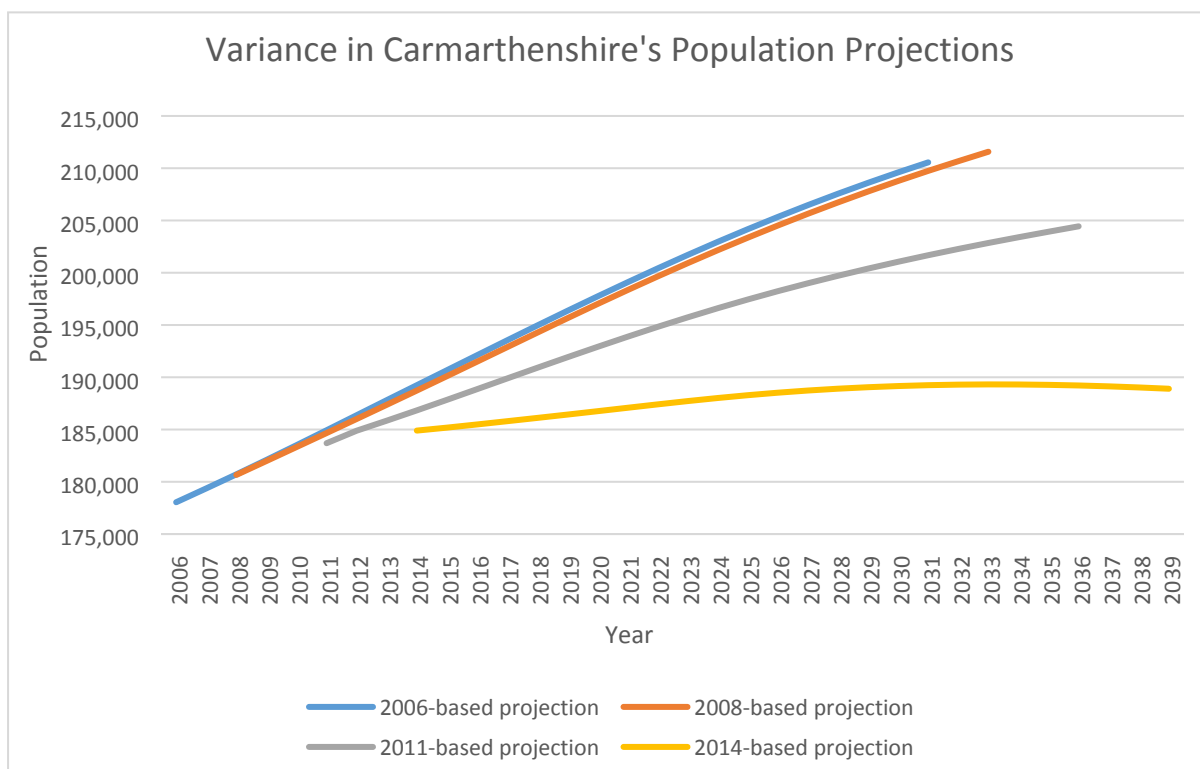
#### Context

The adopted LDP proposes a strategy based on the principles of sustainability, with growth distributed in a manner which builds on the spatial characteristics and diversity of the County. In this respect, it sought to consolidate on the existing settlement pattern, reflecting and promoting accessibility to essential service and facilities. Essentially, this aimed at achieving self-supporting and viable settlements and communities. In delivering this strategic approach, the LDP identified a hierarchy of settlements by recognising the diversity of settlements across the County, but with a reference to their context and services.

#### Population

In understanding the future requirements for growth, the LDP sought to establish a local set of population and household projections for the Plan period. This challenged the level projected within both the 2006 and 2008- based sub national projections. At the base date for preparing the LDP, the population for Carmarthenshire stood at 178,043, with the 2006 and 2008 based projections suggesting a population increase to 199,080 and 198,330 respectively by 2021. This compares to projected population change within the LDP of 192,740 by 2021.

It is noted that the 2011-based population projections indicated a downward trend in population growth, whilst the 2014-based population projections showed an even further reduction in population growth. The 2011 and 2014 based projections indicated a projected population of 193,874 and 187,079 respectively at 2021. This limited level of population change is projected to continue through the lifetime of the revised LDP with 2033 indicating a County population of 189,295.



In considering the revised LDP period of 2018-2033, the principal projections within the 2014 based projection suggests an increase in the population of 3,499 persons. The notable differences between this population change component and that which underpins the LDP suggests that the revised LDP strategy will require further detailed consideration. Undoubtedly, the prospect of rolling forward the LDP strategy in light of the latest projections would appear unlikely.

Reference is made to the provisions of PPW para 9.2.2 which relates to the need for Local Authorities to have a clear understanding of the factors influencing housing requirements over the plan period. In this regard, consideration will be given to the robustness of the 2014-based projections. It is noted that the projections follow an assumption for future growth based on a set preceding period (5 years). The production of variant population projections will be considered, which will potentially take into account considerations such as

longer based trends and supporting economic and social policy interventions, including the City Deal.

### **Household Projections**

As part of the preparation of the LDP, the Council, considered the appropriateness of the WG projections, (2006 and 2008 based household projections) by commissioning Edge Analytics to undertake an assessment of these projections. The report produced a number of other population and household projection scenarios for the County within the plan period. As a result of this reassessment, a scenario based on future net migration assumptions (based upon the 5 years of evidence 2005-2009) and the 2009 Carmarthenshire mid-year estimate was selected as the most appropriate basis for consideration within the LDP.

In applying the above, a housing requirement of 15,197 dwellings for the plan period was identified for the LDP.

The subsequent 2011-based Local Authority Household Projections identified a significant reduction in the forecasted numbers of dwellings required within Carmarthenshire during the remainder of the plan period 2011-2021, and were subject to consideration through the Examination.

At that point it was too early to establish whether the 2011-based Local Authority projections represented an ongoing downward trend, or if they were a reflection of the prevalent economic context (for the period during which they were prepared), the publication of 2014-based sub-national projections further emphasised the projected downward trend (see figure X below).

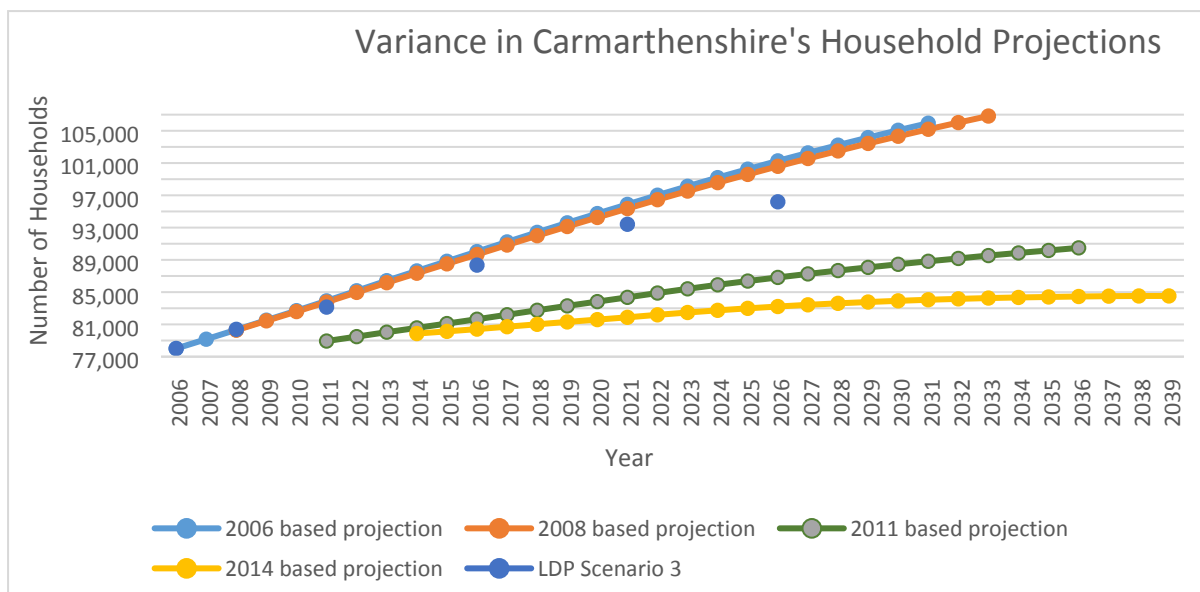


Figure X shows the difference in the number of households within the County utilising the 2006, 2008, 2011 and 2014 based projections. What is clearly apparent is the difference in the values between the 2006-based and the 2014-based projections. Similarly, the difference between the 2011 and 2014 based projections shows a continual year on year variance. Scenario 3 which forms the basis for the LDP housing requirement (highlighted by the dots on the graph) shows the growth projected through to 2021.

Whilst the above projections indicate a significant reduction in household numbers from that projected within both the 2006 and 2008 based projections, their use, in development plan terms should, as with population projections, be considered within the context of the provisions of paragraph 9.2.2 of PPW. There will need to be a clear understanding of the factors influencing housing requirements in the area over the plan period, with the latest Welsh Government sub national Household Projections forming part of the evidence base, together with other key issues.

It is also clear that household projections provide estimates of the future numbers of households and emerge through population projections and assumptions about household composition and characteristics. Consequently, the Council will need to assess whether the various elements of the projections are appropriate for County, and if not, undertake modelling based on robust evidence, which can be clearly articulated and evidenced, to identify alternative options.

In this respect, the relevant evidence for any deviation must also be considered in the context of viability, and ensure that any change in growth requirements is deliverable. The

Council will consider the relevant evidence highlighted above, together with other key issues such as what the plan is seeking to achieve, links between homes and jobs, the need for affordable housing, Welsh language considerations, the provisions of corporate strategies, and the deliverability of the plan in identifying the future housing requirement for the revised LDP.

### LDP Strategic Implications

Matters relating to population and household change form an important component of the LDP evidence base, with the projections for future growth derived from their content central to the LDP strategy. The formulation of any variant projections will inform the considerations around growth requirements, with a direct relationship to the Plan’s spatial expression through the settlement framework and site specific allocations (reference should be had to the consideration under Strategic Policies SP3 and SP5 below).

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

- **Strategic Policies**

#### SP1 Sustainable Places and Spaces

##### Context

Formulated with regard to the delivery of the Plan’s Vision, Strategic Objectives and Strategy, the policy reflects the Plan’s direction of travel in seeking to provide for the building of inclusive communities. Reflecting the sustainable foundation of the Plan is a core principle which will need to be developed and reflect the changing contextual backdrop and the requirements emerging from the Well-being of Future Generations Act and the Environment (Wales) Act.

In this respect, the emerging Carmarthenshire LWP will be an important informant along with other contextual indicators, such as the emergence of revised plans and strategies, or legislative changes. Although in its formative stages, this first Carmarthenshire LWP has been developed for the period 2018 – 2023 with the identified objectives and actions looking at the delivery on a longer term basis of up to 20-years. A review of the emerging well-being objectives at a local and national level against the strategic objectives of the LDP is

appended to AMR2, and will form part of an iterative evaluation of their impact and the potential for consequential change. In this respect the Plan and its strategy will need to respond and develop to these changes. The content of Policy SP1 will develop and express the Plan's strategic direction and its objectives as these are formulated and finalised .

### LDP Strategic Implications

The Policy as it stands is robust in that it reflects the strategic direction of the current LDP, and accords with the provisions of the ICS. The changes at a national level and the emerging Carmarthenshire LWP along with other matters relating to the effective implementation of the LDP, or otherwise, will have an impact on the policy's future iterations.

Which Tests of Soundness would these revisions to the LDP address?	
4. Does the Plan have regard to national policy?	✓
5. Does it seek to meet the assessed needs?	✓
6. Will development be viable?	✓

### SP2 Climate Change

#### Context

The LDP recognises the potential impacts of climate change by acknowledging the unique qualities of the County and assisting in making it, and its communities more sustainable. The LDP looks to tackle the causes and effects of climate change within our communities through the adoption of sustainable principles and development. Whilst the LDP as a development plan is founded on robust evidence and sets a firm policy framework it also incorporates an element of horizon scanning which allows for the recognition of existing communities and the importance of resilience.

Reflecting on the sustainable foundation of the Plan is a core principle of this policy and its future iterations will need to reflect the changing contextual backdrop. Most notably, it will need to consider the requirements emanating from the Well-being of Future Generations Act and the Environment (Wales) Act.

The LDP categorises settlements into a hierarchy which reflects their relative sustainability according to the availability of services or facilities, or through general accessibility benefits. The Plan's aspiration of minimising the need to travel, particularly by private motor car, and its

contributory role towards the facilitation of an integrated transport strategy seeks to direct development to appropriate locations.

The consideration of any proposals in respect of flooding have regard to the provisions of PPW and TAN 15: Development and Flood Risk. Due regard will need to be given to any revision of TAN 15 and the policy position in relation to the potential mandatory standards for Sustainable Drainage Systems.

### LDP Strategic Implications

The Policy as it stands is robust in that it reflects the strategic direction of the current LDP and accords with the provisions of the ICS. The changes at a national level and the emerging Carmarthenshire LWP, along with other matters relating to the effective implementation of the LDP, or otherwise, will have an impact on the policy's future iterations.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

### SP3 Sustainable Distribution – Settlement Framework and SP5 Housing Context

The following considers matters relating to Policies SP3 Sustainable Distribution – Settlement Framework and SP5 Housing. This reflects the intrinsic relationship between policies and their measurements of success or otherwise.

#### Settlement Framework

In spatial terms, the LDP strategy identified a settlement framework which recognised the importance of sustainability, whilst acknowledging the role and potential contribution of identified settlements to its implementation. The policies had regard to factors such as size, location and other sustainable credentials, such as accessibility of services and facilities. Supported through evidence, the role and function and subsequent distribution of growth of the following multi-tiered hierarchy was established:

- Growth Areas;
- Service Centres;



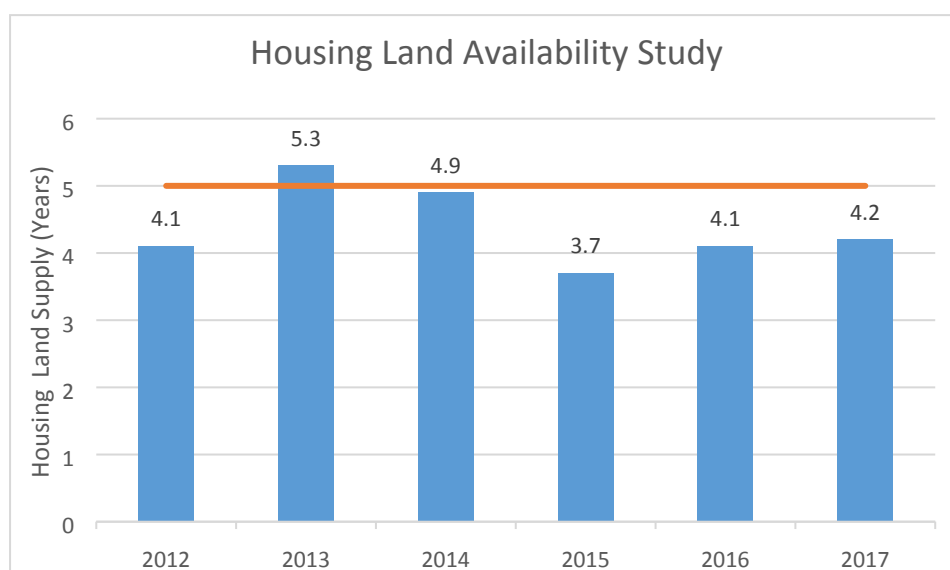
- Local Service Centres; and
- Sustainable Communities.

How the success of this hierarchy measures up in terms of the delivery of growth forms a key outcome in respect of both AMR's, particularly in relation to the Service Centres and Local Service Centres. This is further considered below.

### Housing Land Supply

National planning policy requires LPAs to ensure that sufficient land is genuinely available to provide a five year supply of land for housing, as set out in TAN 1: Joint Housing Land Availability Studies (January 2015). The first Joint Housing Land Availability Study (JHLAS) to use the adopted LDP was the 2015 Study, which revealed a land supply of 3.7 years. The 2016 Study showed an increase to 4.1 years of land available whilst the latest Study, the 2017 Study, again showed a slight increase to 4.2 years of land available.

As illustrated in **figure X** below, whilst housing land supply has increased during recent years, this is the fourth study since 2013 where the five year supply requirement has not been met.



TAN 1 states that where a shortfall in the housing land supply is identified, the LPA, in its AMR, should consider the reasons for the shortfall and whether the LDP should be reviewed either in whole, or in part. The implications of the high growth requirements that underpin the LDP have been discussed in the second AMR. Whilst these projections have proved to be challenging in terms of delivering housing numbers, they were deemed to be robust given the information available at that time, particularly given that the preceding period was one of

a buoyant economy. The economic recession and a slow housing market has had a significant effect on the delivery of housing allocations.

In calculating housing supply in line with TAN 1, the residual method is used. This method is calculated by comparing the quantity of land agreed to be genuinely available with the remaining housing requirement in the adopted LDP. As the LDP population projections are high, the remaining housing requirement is also high. Another method of calculating housing land supply has been used in the past under previous TANs, based upon past build rates. LPAs were able to use this method if they did not have an adopted Development Plan, however, this calculation was also undertaken for information and comparison purposes. If this method was still in use, the land supply for the past few years would be in excess of 5 years.

The AMRs provide further discussion and considerations for the lack of a five year supply of housing land. However, there is clearly an issue needing to be addressed, as the lack of a five year housing land supply along with a downward trend in projected housing requirements will result in a review of all undeveloped housing allocations within the current LDP as part of the Plan revision process. Whilst this may result in certain housing allocations being removed from the revised LDP, and new sites potentially coming forward and included, it will allow for the Plan to better reflect and deliver the required housing requirements through to 2033.

### **Housing Permissions and Distribution**

The rate of permissions across the settlement hierarchy on LDP allocated sites shows that during AMR2, only the service centres were within the 20% tolerance. Growth Areas and Local Service Centres underperformed with the Sustainable Communities over performing in percentage terms. Of particular note is the under performance of the Local Service Areas in AMR2 with just one unit granted permission. This contrasts with the strong performance within AMR1 - it is noted however that this was largely on the basis on a single site obtaining permission for 91 units.

The above 137 units on allocated sites contrasts with the total 584 dwellings (374 of which are on +5 sites) permitted. It is also noted that windfall permissions has dropped from 784 to 407 dwellings. This may be due to the reduction in the number of Unitary Development Plan (UDP) legacy sites with a valid permission coming forward, which would reflect the transference from the previous Plan to the LDP.

Housing delivery has generally fallen over Wales in recent years, which has had an impact within Carmarthenshire. This can be put down partly to the economic recession and a slow market. Build rates on large sites have fallen slightly this year but the general trend shows a general increase over the past few years, but have not peaked to the levels seen in 2008.

**Large Site Completions since the LDP base date**

2017	2016	2015	2014	2013	2012	2011	2010	2009	2008
426	516	429	379	317	276	563	300	263	647



AMR2 indicates that the housing permissions granted have not been sufficient to meet the requirements for growth and distribution in accordance with the LDP strategy. Figure X illustrates the wide gap that exists between actual housing completions and the LDP housing requirement. The level of growth and the spatial distribution of that growth will require reconsideration when revising the LDP, in order to address the lack of a five year supply of housing land and potentially a reduced household requirement. The evidence in relation to the role and function of settlements will be refreshed to ensure that the understanding of a settlement’s contributions to the County and its communities, along with their potential to provide for growth, is appropriately understood. Reference will also be made to the role of rural and urban centres in serving the wider communities. This evidence work will form an important role in reviewing the LDP strategy, and in particular for the spatial distribution of growth and sites

The housing land requirement in the LDP identifies the need for 15,197 dwellings, however the Plan allocates land for 15,778 dwellings, providing 3.7% flexibility (or 581 dwellings). The revised Plan will consider the appropriate level of flexibility, in line with any changes in relation to the amended household requirement.

### LDP Strategic Implications

The implications of this review on delivery, the distribution of growth and allocated sites will impact across the Plan area and will not be limited to individual areas. As such this also requires a full revision to the Plan.

The outcome of evidence gathering in relation to role and function of settlements along with an assessment on the sites best placed to meet the settlements and communities needs, will have potential impacts on the revised Plan Strategy.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

### Specific Policies – Housing

The specific housing policies identified within the adopted LDP seek to build upon the spatial strategy and settlement framework set out within Chapter 5 of this Plan. These include policy SP3 - Sustainable Distribution - Settlement Framework, as well as the housing land requirement identified through policy SP5 - Housing. In this respect, the policies will develop as the understanding of the strategy, the settlement framework and the housing requirements progresses. The role rural areas and their contribution in delivering the potential housing requirement will be subject to further consideration. Appendix 2 of this review report outlines and considers the housing allocation sites listed within Policy H1 Housing Allocations.

Whilst subject to review in light of changes arising from the revision process and contextual changes, much of the policies within this section of the Plan remain fundamentally sound.

It is recognised that evidence in relation to the provision for GTAA will facilitate a change to the Plan. Whilst the policy remains robust in terms of the criteria for identifying sites for Gypsies and Travellers, the allocation, or otherwise of a site will need to be considered.

## SP4 Strategic Sites

### Context

The sites identified within policy SP4 (either individually, or cumulatively) reflect those which are identified as making a significant contribution to the delivery of the LDP strategy. The following table reflects the progress, or otherwise, in the delivery of the sites within the context of their strategic role. Whilst the commentary and the colour coding are not definitive in terms of their future allocation within the revised LDP, some sites will require re-consideration either:

- As a reflection of concerns over their delivery; or
- As a recognition that progress or changes in circumstance no longer require their identification as a strategic site.

The future inclusion of these sites will be subject to the site assessment methodology.

Strategic Site	Proposed Use	Site Ref	Comment
Site 1 – West Carmarthen	Mixed Use	GA1/MU1	<p>The site forms the Planning &amp; Development Brief for West Carmarthen. Progress has been made on housing elements with construction of part of the development site underway. That part of the site completed before the commencement of the Plan period (2018) will not contribute to meeting housing land requirement.</p> <p>The site forms part of the Planning &amp; Development Brief for West Carmarthen. Whilst there has been no activity in relation to the specific employment allocation, progress is underway with the first phase of construction at Yr Egin. A core project within Carmarthenshire as part of the Swansea Bay City Deal, Yr Egin is a new media and culture hub predicted to have a significant positive impact on Carmarthen. Based on the office and workspace as well as further potential development, around 200 full-time posts will be generated. It can also be noted that some progress has been made on housing elements of the site with the West Carmarthen Link Road under construction.</p> <p>The progress to date and its intensification over recent years indicates that delivery during the period of the revised LDP will be achieved. Detail on the phasing of delivery will be developed.</p>

<b>Site 2 – Pibwrlwyd, Carmarthen</b>	Mixed Use	GA1/MU2	<p>Planning permission granted for a small portion of the site. Corporate backing for the site is likely to see the site come forward through a masterplan approach reflecting the emerging proposals of the college and its campus. The site's long term allocation within previous development plans is noted and as such clarity around its delivery will be required.</p> <p>Further consideration on the mix of potential uses and re-consideration through the candidate site and/or pre-deposit stages will be required.</p>
<b>Site 3 – South Llanelli Strategic Zone</b>			
Delta Lakes	Mixed Use	GA2/MU9	Hailed as the 'largest ever regeneration project in South West Wales', this site is earmarked to provide a 'world class' Wellness and Life Science Village. This is a key project for the Swansea Bay City Region and is earmarked to receive £40million as part of the £1.3billion City Deal funding. An outline planning application is being formulated, the EIA scoping is proceeding and a community consultation event has been undertaken. Initial ground works / site preparation / levels have been undertaken.
Machynys	Residential Residential Mixed Use	GA2/h12 GA2/h14 GA2/MU3	<p>Site GA2/h14 is completed. GA2/h12 is substantively completed - any units / capacity remaining will be considered for the revised LDP. The future strategic contribution of this site can be assessed as part of any wider review of the South Llanelli Strategic Zone moving forward.</p> <p>GA2/MU3 – Site allocation to be reviewed in light of pending planning application for 35 residential units. Also, whilst it is understood that the site will be outside of the outline application area, its potential strategic contribution to the Wellness and Life Sciences Village as part of wider masterplan proposals can be recognised.</p>
The Avenue	Residential Residential	GA2/h13 GA2/h15	<p>Part of GA2/h13 (circa 50%) has been completed, there is no firm indicator as to remainder – however there is capacity for +5 units and evidence of deliverability established. The future strategic contribution of this site can be assessed as part of any wider review of the South Llanelli Strategic Zone moving forward.</p> <p>GA2/h15 – The site is likely to form part of the Wellness and Life Sciences Village outline planning application. Further consideration will be required to ensure allocated use is reflective of the wider masterplan and that its potential strategic contribution is reviewed.</p>
North Dock	Mixed Use	GA2/MU7	<p>The area remains a focus for regeneration and has seen the incremental delivery of a mix of uses. North Dock forms part of the South Llanelli SPG.</p> <p>A previous phase of residential development has long since been completed. There is therefore a requirement to monitor the progress being made in bringing forward further residential development (with the former Pontrilas building and adjacent land of note in this regard).</p>
Old Castle Works	Mixed Use	GA2/MU1	Whilst the site forms part of a broader set of regeneration proposals and is included within the Adopted SPG for South Llanelli, there are no known firm proposals, albeit there has been exploratory interest.

<b>Site 4 – Dafen, Llanelli</b>	Employment	GA2/E1	Approximately 2.49 hectares of land delivered. The remainder of site is deemed to be deliverable with strong accessibility and infrastructural attributes.
<b>Site 5 – Cross Hands Strategic Zone</b>			
Cross Hands West	Mixed Use	GA3/MU1	Initial phase of the residential development completed. That part of the site completed before the commencement of the Plan period (2018) will not contribute to meeting housing land requirement. Progress to date provides a strong indication in terms of the delivery of the remainder of the residential element of the allocation.  Retail development on part of the site is substantively complete with road infrastructure etc. also in place. Whilst element such as the Health Resource Centre is still pending the substantively complete nature of the site is unlikely to require its ongoing inclusion as a strategic site.
Cross Hands East	Employment	GA3/E7	Outline planning permission for the whole site. Site benefits from improved highway access afforded by the new Cross Hands link road. The sites' identification within the context of the Swansea Bay City Region confirms its ongoing importance in strategic terms.
Cross Hands West Food Park	Employment	GA3/E8	The site forms part of the Cross Hands Strategic Zone. Approximately half of the site has been developed and there are estate spine roads into parts of the remaining available site Plateaus. The site has proved successful in delivering on Cross Hands strategic location and context. The reduced availability of developments on the site (given the level of take up) will be considered in assessing its future status as a strategic site.

### LDP Strategic Implications

The identified strategic sites have, in the main, proved successful in delivering the key elements of the plans land use aspirations. Whilst a number of sites have not progressed in a manner anticipated, these are largely reflective of the challenging economic environment and evolving site considerations. The Strategic allocations will be reviewed in light of any changes in growth requirements and to the form of the spatial strategy. In this respect, revisions to residential, employment and mixed use allocations within the revised Plan will be undertaken. The necessity for a full revision of the LDP is essential, given the necessity to review housing supply to ensure that it is sufficient and reflective of the amended growth requirements evidence.. It will also be necessary to ensure that allocated sites are deliverable. The implications of this review of allocated sites will impact across the Plan area, and will not be limited to individual areas. As such this also requires a full revision to the Plan.

Which Tests of Soundness would these revisions to the LDP address?

1. Does the Plan have regard to national policy?

✓

2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

## SP6 Affordable Housing

### Context

The policy seeks to identify the number of affordable housing which will be delivered during the Plan period through various mechanisms. These methods include on-site provision, off-site provision and commuted sums through Policy AH1, and Exception Policies in Policy AH2 and AH3.

The LDP sought to contribute at least 2,121 affordable houses during the plan period. 545 units from committed affordable dwellings (as at March 2014) whilst 1,546 affordable dwellings from potential uncommitted housing allocations. This is in addition to the 30 affordable houses from rural exception sites.

As part of the monitoring framework of the LDP, the monitoring target was to seek 226 affordable dwellings be permitted in the first year of the Plan after adoption, whilst it targets 452 affordable dwellings in the first 2 years after adoption.

For AMR1 (15/16), the performance was relatively successful with 217 units being permitted. In AMR2, this target reduced to 101 units for a combined 318 units during the first 2 years. This falls far lower than the target set in the monitoring framework.

In terms of the proportion of affordable dwellings being developed on residential allocations, the percentage target achieved has varied across affordable housing submarket areas, and even within the submarket areas themselves. This is due to variables within the housing market themselves, in particular the viability of these sites being developed. Secondly, many of the sites (which are highlighted in other sections of the review) are being landbanked.

Since there is a strong correlation between developing housing allocations and the delivery of affordable housing through the planning system, these issues have contributed to a lower number being achieved.

### LDP Strategic Implications



The context above has shown that the delivery of affordable housing has been slower than that set out within Strategic Policy SP6. The LDP will need to reconsider the target set out within the policy framework.

Furthermore, the publication of the 2014-based sub national population and household projections have shown a significant decrease in the number of dwellings required within the revised LDP. Whilst the future strategy and housing requirements will be determined through the background evidential work, it is noted that it will impact on the number of affordable dwellings which will be delivered during the revised LDP period.

Regard will need to be had to the Affordable Homes Delivery Plan<sup>5</sup> which is being implemented by the Housing Section of the Local Authority. This strategy identifies the requirement to provide 1,000 affordable homes for the period 2016 - 2020. This strategy considers all forms of mechanisms to provide affordable homes, of which the planning system plays its role.

### Specific Policies – Affordable Housing

Whilst in general terms, the policies on affordable housing are considered sound, the need to respond to changing economic circumstances will need to be considered, particularly on the affordable housing targets and the threshold for on-site affordable housing contributions. This will involve updating evidential work to support the target levels. Secondly, consideration will need to be given to the role of commuted sum contributions in supporting the delivery of affordable housing.

For local need and affordable housing exception sites, consideration will need to be given to other strategic policies within the plan, in addition to the criteria assessment set out as part of the policy framework.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

### SP7 Employment – Land Allocations

<sup>5</sup> Affordable Homes Delivery Plan 2016 – 2020: Delivering More Homes for the People of Carmarthenshire

## Context

The planning system is central to ensuring continued economic growth and providing jobs and investment in an environmentally sustainable way. Economic growth generates wealth and raises living standards, and is driven by an increase in employment and productivity which in turn is determined by higher levels of investment, innovation, competition, skills and enterprise. In this respect, the LDP represents a central component in establishing and setting out the opportunities for growth and the framework to guide and facilitate investment.

In terms of the adopted LDP, the role of employment and the economy represents a central consideration in supporting the Plan and its Strategy. In this regard, there is a need to ensure that sufficient, suitable and deliverable land for employment purposes is designated in accordance with sustainability principles and the Spatial Strategy.

The Council has a statutory responsibility to ensure that sufficient employment land is available to meet identified need. In particular, it is a reflection of the requirements of the current edition of PPW and TAN 23 *Economic Development*. Paragraph 7.5.1 of PPW states that development plans should:

- be underpinned by an up to date and appropriate evidence base to support policy choices and land allocations for economic development;
- provide targets on land provision for the employment uses (Classes B1-B8), showing net change in land/floorspace for offices and industry/warehousing separately, and protect these sites from inappropriate development;
- seek to provide the right amount of land and qualitative mix of sites to meet the market demand for economic development uses.

The evidence in relation to economic policy and the requirements for employment land within the Plan were informed by the Carmarthenshire Employment Land Study 2010. Together with further updates produced for the LDP Examination, the amount of employment land to be allocated in the Plan was set at just over 111 hectares.

Subsequent studies have been produced since adoption of the LDP in 2014. Two AMRs and two Employment Land Reviews (ELRs) have been published which address the take up of employment land over this period, and highlight that just over 27 hectares of land allocated for employment purposes in the LDP has been delivered over the Plan period. Further land

amounting to nearly 5 hectares has been taken up for employment uses on land annotated as existing employment land within the Plan, as well as over 8 hectares of planning permissions for employment uses on land not identified for employment purposes.

An Employment Sectoral Study for the County was recently commissioned; this reflects the commitment to continually review of evidence in support of the LDP, and other corporate documents and strategies. The findings set out within the Study will provide additional evidence as part of the ongoing monitoring and revisions to the LDP.

The Study will enhance the Council’s understanding of employment need by sector and how this will manifest itself over the coming years. As well as setting out the economic context for the County, including general economic characteristics and the key growth sector and growth areas, the Study will cover the future requirements for employment space and will discuss the “demand / supply balance” (e.g. a comparison of estimated land requirements with the current supply of employment space).

The following reflects and considers those sites identified as contributing to the delivery of employment provision within the County. Whilst the commentary and the colour coding are not definitive in terms of their future allocation within the revised LDP, it provides an indication of a sites relative progress in terms of delivery.

The future inclusion, or otherwise of these sites will be subject to re-assessment reflecting onto only the appropriateness and deliverability of the site, but also the nature of need within the County, as well as the requirements emanating from the Plan’s Strategy.

LDP Ref	Site Name	Location	Ha	Status
GA1/E1	Cillefwr Industrial Estate	Carmarthen	4.38	The allocation forms an extension to the existing, well-established industrial estate, however no planning applications have been received in recent years.
GA1/MU1	West Carmarthen	Carmarthen	5.45	The site forms part of the Planning & Development Brief for West Carmarthen. Whilst there has been no activity in relation to the specific employment allocation, progress is underway with the first phase of construction at Yr Egin. A core project as part of Carmarthenshire’s contribution to the Swansea Bay City Deal, Yr Egin is a new media and culture hub predicted to have a significant positive impact on Carmarthen. Based on the office and workspace as well as further potential development, around 200 full-time posts will be generated. It can also be noted that some progress has been made on

GA1/MU2	Pibwrlwyd	Carmarthen	15.50	Planning permission granted for a small portion of the site. Corporate backing for the site is likely to see the site come forward through a masterplan approach.
GA2/MU9	Delta Lakes	Llanelli	9.78	Site subject to proposals for the Wellness and Life Sciences Village as part of the City Deal – see site South Llanelli Strategic Zone as previously reviewed under policy SP4 Strategic Sites.
GA2/E1	Dafen	Llanelli	22.80	Approximately 2.49 hectares of land delivered. Remainder of site deliverable with strong access and infrastructure attributes.
GA3/E1	Cross Hands Business Park	Ammanford/ Cross Hands	0.79	Planning permission granted for whole site.
GA3/E2	Meadows Road, Cross Hands	Ammanford/ Cross Hands	1.16	No planning applications received, however the site is situated at a strategic location surrounded by existing employment uses within the Cross Hands Strategic Zone.
GA3/E3	Parc Menter, Cross Hands	Ammanford/ Cross Hands	1.04	This remaining portion of a much larger existing employment site has seen further take up in recent years. An estate road provides access to the as yet undeveloped area.
GA3/E7	Cross Hands East	Ammanford/ Cross Hands	9.22	Outline planning permission for the whole site. Site benefits of site infrastructure with highway access onto the new Cross Hands link road. The sites' identification within the context of the Swansea Bay City Region confirms its ongoing importance in strategic terms.
GA3/E8	Cross Hands West Food Park	Ammanford/ Cross Hands	8.91	The site forms part of the Cross Hands Strategic Zone. Approximately half of the site has been developed and there are estate spine roads into parts of the remaining available site plateaus.
GA3/E10	Capel Hendre Industrial Estate, Capel Hendre	Ammanford/ Cross Hands	4.05	There has been on-going incremental small scale delivery on parts of the remaining areas of this large industrial estate. The as yet undeveloped parts of the allocation are serviced by estate roads.

GA3/E11	Parc Hendre, Capel Hendre	Ammanford/ Cross Hands	11.73	No recent planning history on the allocation, however the whole site is serviced by an estate road, lies adjacent to existing employment uses and is located along a strategic transport route within a short distance of the M4.
GA3/E12	Heol Ddu, Tycroes	Ammanford/ Cross Hands	0.34	Outline planning permission has been granted on this site.

LDP Ref	Site Name	Location	Ha	Status
T2/1/E1	Dyfatty	Burry Port	3.28	The whole site has planning permission for the delivery of site infrastructure.
T2/2/E1	Beechwood Industrial Estate	Rhosmaen/ Llandeilo	2.33	A small portion of the site has been delivered. There has been interest in the large remaining site over recent years but no scheme has yet been delivered.
T2/4/E1	Sunny Bank	Newcastle Emlyn	1	This sizeable allocation is situated between two existing employment sites within the development limits of the settlement. It is noted the site has been a longstanding allocation and no planning applications have been received.
T2/5/E1	Land adjacent Station Yard	St Clears	0.33	No planning applications to date.
T2/5/E2	Land adjacent A40	St Clears	1.23	This site is located adjacent to the strategic A40. Over half of this site has already been delivered.
T2/5/MU1	Old Butter Factory	St Clears	0.36	The site has planning permission for a mixed use development, with part employment use.
T2/6/E1	West Street	Whitland	0.27	This site has been delivered. Annotation will be amended to reflect its status as an existing employment site.
T2/6/E2	Whitland Industrial Estate	Whitland	1.07	Approximately half of this site has been delivered.
T2/6/E3	Whitland Creamery	Whitland	1.7	Whilst it is noted that there have been discussions over recent years, there has to date been no employment related planning applications. It is also noted that interest remains in part of the site being brought forward for residential use.

T3/8/E1	Land east of Station Road	Glanamman/ Garnant	0.7	No planning applications to date.
T3/11/E1	Old Foundry	Llanybydder	0.51	No recent planning applications.
SC34/E1	Pantyrhodyn Industrial Estate	Cilyrychen	1.5	This site has been delivered. Annotation will be amended to reflect its status as an existing employment site.
SC34/E2	Cilyrychen Industrial Estate (north)	Cilyrychen	1.7	Whilst no planning applications have been received in recent years, the allocation comprises the two remaining portions of an established, serviced industrial estate.

### LDP Strategic Implications

The role of employment in understanding the role and function of settlements and their consequential contribution to its residents and the wider community is recognised. Consequently, whilst it is considered that the employment policies within the Plan are robust in strategic terms, future plans, programmes and strategies on employment will need to be fully considered and where appropriate reflected.

The implication on the strategy of changes in employment patterns will be monitored and reflected. This recognises that the employment market is constantly changing and that the need to respond to this developing context is essential in long term planning.

### Specific Policies – Economy and Employment

Whilst in general terms the policies on employment are considered sound, the need to respond to changing economic circumstances will be considered, particularly the differing demands and requirements of the rural and urban areas of the County.

In this regard, evidence in the form of the LDP Annual Monitoring Reports, the Employment Land Reviews and the Sectoral Needs Study, together with the changes in relation Chapter 10 PPW and TAN 23: Economic Development will be key informants in any revisions to the specific LDP employment policies.

The provisions of policy EMP5 and the mixed use sites identified will be amended to reflect any changes in the selection of sites arising from changes in the strategy and amount of employment land required and where.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

## SP8 Retail

### Context

The evidence in relation to convenience and comparison retail requirements for the Plan were informed by the Carmarthenshire Retail Study 2005 which was further developed through an update undertaken in 2009. The study provided:

- An assessment of future needs for additional retail facilities during the Plan period;
- An analysis of the role, function and network of existing centres;
- An assessment of the centres' capacity to accommodate growth; and
- The potential to redistribute retail expenditure.

In relation to convenience, the Council's approach in the LDP centred on the promotion of greater retention of convenience trade in smaller settlements. This indicated the potential for additional convenience floor space for between 6,212sq.m and 18,118sq.m. The higher figures indicate floorspace capacity if occupied by convenience discounters, whereas the lower figures indicate capacity if occupied by one of the then 5 main convenience operators. It was not considered necessary to identify any sites to accommodate this need. This approach has been borne out through the changing market dynamic within the retail sector, with the growth in discounters and the rise in smaller local stores. The 2015 update to the retail study indicates that in quantitative terms, there is adequate provision for convenience goods floor space, however given the significant trade currently attracted to the discount retailers, there may be scope for these existing stores to be extended or new discount stores in areas where there is limited existing provision.

The 2015 Retail Study indicated that in terms of comparison goods, expenditure had decreased since the 2009 study. It also recognised that there will be floor space requirements in all the principal and smaller centres within the Plan. However, based on the current pattern Carmarthen has the greatest capacity for further retail development. The need within other centres may be accommodated through re-occupation of vacant floor space or within existing commitments.

Given the above, there is no indication that a significant change is needed to retail policy, both in terms of convenience or comparison provision. It is unlikely that any specific allocation will be required in response to identified need.

#### Llanelli Retail Provision

Consideration will need to be given to the emerging Local Development Order (LDO) for Llanelli Town Centre. The LDO is part of a co-ordinated response to regeneration initiatives. It is a reflection of the challenges faced by centres within a changing retail environment. Llanelli, as a long-standing retail centre, has exhibited issues of concern in relation to vacancy rates and as a result of the challenges from out of town shopping provision in the form of Parc Trostre and Parc Pemberton. **Some of the considerations affecting Llanelli Town Centre are of a localised nature and not necessarily systemic across the whole area. In this respect the Draft LDO seeks to reflect such challenges.** Reference can be made to the Statement of Reasons being prepared in support of the emerging LDO. The role of the Llanelli Town Centre Task Force which was established after the adoption of the LDP will be reflected in any revised policy considerations for Llanelli Town Centre.

In this respect, the Council has been successful in securing funding through the Welsh Government's Vibrant and Viable Places which has introduced a new regeneration fund with prioritised targeted investment:

As part of the successful Vibrant and Viable Places, £1 million of funding was secured along with circa £1.12 million available through a successful bid for pipeline funding and Council contributions. This has seen 7 properties purchased, and 1 property renovated, with its retail floor space occupied, whilst 2 properties were secured where works have commenced. The occupied retail unit has proved successful by linking into the deprivation aspects of the Vibrant and Viable Places agenda, with links to Communities First and the Steps Projects offering experience and opportunities within the community. Consideration will be given to a Town Centre Masterplan which could inform any interventions e.g. - redevelopment opportunities and future acquisitions.

Regard will be had to the specific challenges faced by the Town Centres of Carmarthen, Llanelli and Ammanford and the responsiveness of the respective policies to their particular needs and any issues that may arise. Reference is made to the Carmarthenshire Town Centre Audits and the AMRs which indicate positive outcomes in relation to tackling



vacancy, and in maintaining the retail integrity of the Primary Retail Frontage. They also indicate a degree of inconsistency with elements of the town centres performing better in proportional terms than others. **This may indicate that potential ‘solutions’ and/or planning policy interventions need not take the form of a ‘one size fits all’ and may be tailored to the specific requirements of that centre.**

### **LDP Strategic Implications**

It is considered that the retail policies within the Plan are robust in strategic terms. However, any indirect consequences in terms of the location and nature of retail provision will be matters for consideration in a revised LDP.

The implication on the strategy of changes in retail patterns will be monitored and reflected. This recognises that the retail market, and how consumers access provision and buy goods is rapidly changing, and that the need to respond to this developing context is essential in long term planning.

### **Specific Policies – Retailing**

In general terms the policies on retail are considered sound. However, the need to respond to a changing retail market will be considered as necessary.

<b>Which Tests of Soundness would these revisions to the LDP address?</b>	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

## **SP9 Transportation**

### **Context**

The provisions of the Active Travel (Wales) Act 2013 places a legal requirement for local authorities in Wales to map and plan for suitable routes for active travel, and to build and improve their infrastructure for walking and cycling every year. It creates new duties for highways authorities to consider the needs of walkers and cyclists and make better provision for them. It also requires both the Welsh Government and local authorities to promote walking and cycling as a mode of transport.

In this respect by connecting key sites such as workplaces, hospitals, schools and shopping areas with active travel routes, the Act will encourage people to rely less on their cars when making short journeys. The LDP will seek to reflect the obligations of the Act. Reference is also made to the provisions of the LDP's specific policies in relation to Transportation and Accessibility.

Elements of the contextual background underpinning the Policy and its supporting text requires a level of amendment to reflect the changes in priorities of schemes, routes, strategic documents and supporting information. It also needs to reflect any implications arising from a change in strategic approach. In this respect, the developing evidence, including that in relation to the role and function of settlements will require consideration in informing any future revisions of the policy.

The policy makes reference to identified highway infrastructure and improvements. Consideration will need to be given to any amendments to the Trunk Roads Forward Programme by the WG. Most notably, the commencement and implementation of the improvements on the A483 at Llandeilo and Ffairfach, and A40 Llanddewi Velfrey to Penblewin will need to be considered

Regard will be had to the Joint Local Transport Plan (LTP) for South West Wales 2015 – 2020. Replacing the RTP (prepared by the SWWITCH consortia) the four authorities in South West Wales have worked collaboratively in preparing the LTP as an overarching City Region LTP, with four local programmes of projects.

The LDP seeks to reflect the provisions of the emerging LTP, however it was prepared within the context of the RTP and the Carmarthenshire Priorities for Transport 2009 - 2014. Further consideration needs to be given to the policy and land use implications of the schemes identified within the LTP. These will be identified within the provisions of the Policy. The Proposals Map will be amended to reflect known and defined routes.

The existence of the Air Quality Management Areas at Llanelli and Carmarthen are not reflected in the LDP, given their designation in August 2016. These are in addition to that area already designated in Llandeilo.

### **LDP Strategic Implications**

It is not anticipated that any of the above impacts directly on the delivery of the Plan’s Strategy. It is noted that future Plans, programmes and strategies on infrastructure improvements will need to be fully considered, and reflected upon where appropriate.

The provisions of the Active Travel (Wales) Act are already reflected within the LDP and its policies, however regard will be required to its provisions in Plan preparation.

### Specific Policies – Transport and Accessibility

Consideration will be required in respect of the provisions of the Active Travel (Wales) Act 2013. In this respect, the policy provisions set out in relation to Location of Development and Highways in Developments, (TR2 and TR3 respectively) will require review to ensure they are fully reflective of contextual changes. Similarly, the emphasis on cycling and walking within TR4 may require further consideration. It is recognised that the policy currently provides a positive framework, particularly in relation to the new duty under the above act. It considered the needs of walkers and cyclists, and how to make better provision for them.

Regard will be had to the latest strategy in relation to improvements to the cycle network. Programmed improvements referenced within the Plan will be reviewed in light of any progress in delivery and revisions to the cycle strategy. In this respect, both AMRs have indicated clear and substantive progress in relation to the delivery of both the Towy Valley and Amman Valley routes, with the latter only requiring the completion of a small remaining section. The absence of any proposals to proceed with the Whitland to Llanglydwen route is also recognised.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

## SP10 Sustainable Mineral Development

### Context

Land use planning policy guidance for mineral extraction and related development in Wales is set out in PPW and supplemented by Minerals Technical Advice Notes (MTANs). There are currently two MTANs in respect of minerals - MTAN 1: Aggregates (2004) and MTAN 2: Coal (2009).

In most cases, mineral planning is an appropriate subject for collaboration between local authorities. In terms of aggregates, the regional consideration of demand and supply is carried out by the two Regional Aggregates Working Parties (RAWPs) for North and South Wales. The role of the RAWPs is to examine issues of aggregates provision and to draw up a Regional Technical Statement (RTS) setting out the strategy for the provision of the aggregates in each region for a specified period.

The RTS determines the contribution each authority should make towards meeting regional needs. LDPs should therefore show evidence that the local authority has the necessary landbank of mineral reserves to meet the identified need. Evidence set out in the first two LDP AMRs indicate that Carmarthenshire has an adequate landbank for the required period for both hard rock, and sand and gravel. Whilst this means that no new mineral allocations are required at the present time, the situation will need to be continuously monitored throughout the revision of the LDP.

Further evidence set out within the AMRs indicate that the LDP is meeting all its targets in respect of minerals. One indicator relates to the continued review of dormant sites and the serving of Prohibition Orders on those sites considered not likely to be re-worked in the future. The importance of this process is set out in PPW as the removal of such sites would lead to a consequential reduction in an Authority's mineral landbank.

Areas to be safeguarded have been identified on the LDP proposals maps and a policy within the Plan protects potential mineral resources from other types of permanent development which would either sterilise them or hinder extraction. Whilst the targets relating to this policy issue have been met, their continued monitoring will inform the revision of the LDP.

### **LDP Strategic Implications**

The role of minerals in any strategy is recognised. However, whilst it is not anticipated that any of the above impacts directly on the delivery of the Plan's Strategy, it is noted that future

plans, programmes and strategies on minerals will need to be fully considered, and where appropriate reflected.

The provisions of PPW and the MTANs are already reflected within the LDP and its policies, however, regard will be required to be made to their provisions in Plan preparation, including at a strategic level, where the evidence and recommendations set out within the RTS and the annual SWRAWP reports will inform.

### Specific Policies – Minerals

Whilst in general terms the policies on minerals are considered sound, the need to respond to changing circumstances will need to be considered.

In this regard, evidence in the form of the LDP AMRs, together with the changes in relation Chapter 14 PPW, MTANs 1&2 and the RTS will be key informants in any revisions to the specific LDP minerals policies.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

## SP11 Renewable Energy and Energy Efficiency

### Context

Policy SP11 seeks to support development proposals which incorporate energy efficient measures and renewable energy technologies in appropriate locations. The policy was drawn up in line with the national guidance set out in PPW and TAN 8: Renewable Energy (2005).

The AMRs show that 63MW of renewable energy has been permitted within the two monitoring periods. The Reports also illustrate a significant decrease in the amount of permissions granted for wind energy from the first to the second AMR.

Since the adoption of the policy, the Welsh Government has published Practice Guidance: Planning for Renewable and Low Carbon Energy – A Toolkit for Planners. The Toolkit

requires the production of a Renewable Energy Assessment which will provide and develop a robust evidence base to assess the potential for renewable and low carbon energy generation in the County. The Assessment will underpin the renewable energy policies contained within the Plan.

PPW states that local planning authorities should facilitate the development of all forms of renewable and low carbon energy by considering the contribution that their area can make; creating development plan policies that enable this contribution to be delivered; and, ensuring that development management decisions are consistent with national and international climate change obligations, including contributions to renewable energy targets and aspirations.

Since the adoption of the LDP, the Authority has seen an increase in the number of applications for solar farms. Renewable energy technology advances along with a change to feed-in-tariffs has seen a move to different forms of technology in recent years, this trend is anticipated to continue in the coming years. Plan policies should be flexible to allow for technological advances and new technologies.

Contextual changes have occurred in respect of renewable and low carbon energy since the adoption of the LDP. This will be a key issue for a revised LDP and policy changes are anticipated.

### LDP Strategic Implications

Renewable energy and energy efficiency are integral components to achieving sustainable development, however, it is considered that it will not have a significant effect on the overall strategy of the Plan.

### Specific Policies – Renewable Energy

The specific policies in relation to Renewable Energy will need to reflect the changes discussed above, in particular in relation to changing technologies. The policies will also be informed by the Renewable Energy Assessment.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓

2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

## SP12 Waste Management

### Context

The Waste Framework Directive requires member states to establish an integrated and adequate network for the disposal of wastes. PPW supplemented by TAN 21: Waste (2014) requires that progress towards this is monitored to identify whether sufficient landfill capacity is being maintained; sufficient treatment capacity is being maintained; whether the spatial pattern of provision is appropriate to fill identified needs; and, whether any further action is needed by local planning authorities to address unforeseen issues. The implications resulting from Brexit will need to be taken into consideration over the coming years, but for the time being the requirements set out within the EU Directives still apply to waste management at the national level.

Information on the region's waste management / resource recovery facilities is required in order to monitor implementation of the National Waste Strategy for Wales – 'Towards Zero Waste, 2010' (TZW) – both in terms of the facilities that are being planned for in local authority development plans and in terms of the facilities that are currently operating.

TAN 21: Waste establishes a requirement for each of the three regions in Wales (North, South East and South West) to prepare a Waste Planning Monitoring Report (WPMR) on an annual basis. Central to the process of preparing the Report is the collection and analysis of information regarding the waste situation within each region. The principle role of the WPMR is to collate and present all available data to enable the effective monitoring of both the region's waste arising's and waste management facilities and to assess the region's performance against the targets set out in TZW.

WPMRs are new and were not available when a large number of local planning authorities were producing their first LDPs. The information and analysis presented in the WPMRs should inform LDP formulation and should provide a basis for local authorities and other organisations to take action on the waste arising's within each local authority area and by implication the region as a whole.

## LDP Strategic Implications

The role of waste management in any strategy is recognised. However, whilst it is not anticipated that any of the above impacts directly on the delivery of the Plan's Strategy, it is noted that future plans, programmes and strategies on waste will need to be fully considered and where appropriate reflected.

The provisions of PPW and TAN21 are already reflected within the LDP and its policies, however continued regard will be had to these provisions in preparing a revised plan. The evidence and recommendations set out within the annual WPMRs for the South West Wales region will also be considered.

## Specific Policies – Waste Management

Whilst in general terms the policies on waste are considered sound, the need to respond to changing circumstances will be considered, particularly the potential issues surrounding future landfill capacity within the South West Wales region and the potential need for alternative residual treatment facilities.

In this regard, evidence in the form of the LDP AMRs, the South West Wales WPMRs, together with the changes in relation Chapter 12 PPW and TAN 21: Waste will be key informants in any revisions to the specific LDP waste policies.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

## SP13 Protection and Enhancement of the Built Historic Environment

### Context



The monitoring policy target for the built and historic environment within the AMRs indicate that there are no concerns over the effectiveness of the policy’s implementation. Since the adoption of the LDP, there has been some notable contextual changes at a national level. In this respect, whilst it is not the role of the Plan to replicate national policy or primary legislation, relatively minor and factual changes to the LDP policies or supporting text may be required. Such changes are anticipated to relate to contextual matters and to ensure consistency with national policy - including the Historic Environment (Wales) Act 2016, Chapter 6 of PPW and TAN 24: The Historic Environment.

### LDP Strategic Implications

There are not considered to be any notable issues in relation to its compatibility and consistency with the LDP strategy. Regard will be had to the requirements arising from contextual changes and implications on the future Plan strategy.

### Specific Policies – Environmental Qualities – Built Environment

Reference should be made to the consideration of strategic policy SP13 above. As part of ensuring the Plan is based on up-to-date evidence and information, the content of the policies and supporting text will be reviewed and monitored.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

### SP14 Protection and Enhancement of the Natural Environment

#### Context

Whilst the Plan recognises the need for new development for both social and economic purposes, the Council also seeks to safeguard Carmarthenshire’s environmental quality by enhancing areas of landscape or nature conservation interest. The Policy seeks to ensure the protection and enhancement of the natural environment, and in doing so, contributes towards moderating the potential adverse effects of other policies that infer physical development.

Carmarthenshire has a rich and diverse natural environment with a number of designated sites for nature conservation and biodiversity importance. The protection and enhancement

of those natural and man-made elements that interact and contribute to the quality of Carmarthenshire's landscape, natural environment and biodiversity is a key issue for the LDP.

The first and second AMRs do not indicate any significant monitoring issues in relation to this policy area (both strategic and specific policies). The AMR does however set out some contextual changes that are directly relevant.

The Planning (Wales) Act 2015 has clear implications, and it is noted that amongst other matters, it will provide opportunities to protect and enhance our most important built and natural environments. The Well-being of Future Generations Act 2015 has an overarching aim of requiring all public bodies in Wales that are subject to the Act to work in a way that improves economic, social, environmental and cultural well-being with a view to helping create a Wales that 'we want to live in now and in the future'. The Environment (Wales) Act 2016 delivers against the WG commitment to introduce new legislation for the protection and enhancement of the environment. The critical nature of these pieces of legislation in contextual and implementation terms will be important in the preparation of the revised LDP.

Work is nearing completion by consultants on a Seascape Character Assessment that covers the Carmarthen Bay, Gower and Swansea Bay area. Whilst the policy currently makes reference to designated areas of seascape quality, the policy and specific policies should have regard to the outcomes of this Assessment. Neighbouring authorities intend adopting this assessment as SPG, therefore consideration will be given as to how this will fit in with the policies of the Plan.

In light of the above, there is a need to evaluate and consolidate the ongoing contribution that the LDP is making to the natural environment. This is particularly pertinent due to the interrelation of the protection and enhancement of the natural environment across these three pieces of legislation<sup>6</sup>.

### **LDP Strategic Implications**

The Habitats Regulations Assessment (HRA) of the LDP identified the potential for a likely significant effect on the marsh fritillary butterfly metapopulation of the Caeau Mynydd Mawr Special Area of Conservation (CMMSAC). The HRA therefore recommended the inclusion of

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<sup>6</sup> <http://gov.wales/docs/desh/publications/160610-three-bills-diagram-en.pdf>

a strategy to provide an area, or network of areas, for the management and provision of suitable condition habitat for the marsh fritillary butterfly. It should be noted that the CMMSAC is located within the Cross Hands area which is identified as a key area of growth for the LDP. Failure to reconcile these various demands would have strategic implications for the Plan and raise serious concerns in regards to its delivery.

The required mitigation was prepared in the form of Supplementary Planning Guidance (adopted concurrently with the LDP in December 2014)<sup>7</sup>. This elaborates upon the provisions of LDP Policy EQ7. The second AMR indicates that the SPG is now established and working effectively in terms of delivering an increase in suitable habitat as well as facilitating the delivery of development. The Plan revision may provide opportunities to review this mechanism and its' underpinning evidential facets. In this respect the Policy and any future iterations of the SPG will have regard to and respond to any changes in the conservation objectives for the CMMSAC.

### **Specific Policies – Environmental Qualities – Natural Environment**

In developing the policies the potential future provisions of the Environment Act and the general importance attached to the protection and enhancement of the environment were fully considered. This is demonstrated by the emphasis on enhancement as well as protection.

In terms of local and regional designations, it is noted that there are at present no Sites of Importance for Nature Conservation (SINCs) defined within the plan area. It remains an objective to undertake the identification process and as such the revision would allow for the opportunity for this process to take place. The Council will review and prepare an appropriate evidence base in support of the potential designation of SINCs as part of the revised LDP.

There are opportunities to build upon the considerable emphasis placed on the importance of connectivity in the Plan by exploring and consolidating upon linkages with other policy areas, particularly those that promote green infrastructure. An appropriate review of evidence and the role of the Placemaking and Design SPG, prepared in support of LDP Policy GP1, will be undertaken as part of developing an understanding of the benefits and value of such an approach within a Carmarthenshire context There are also opportunities to

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<sup>7</sup> Caeau Mynydd Mawr Special Areas of Conservation – Supplementary Planning Guidance 2014  
<http://www.carmarthenshire.gov.wales/media/598014/Caeau-Mynydd-Mawr-SPG-ADOPTED.pdf>

review the evidence base, this will be further discussed in the supporting paper on background evidence.

The Plan identifies Special Landscape Areas (SLAs) within Policy EQ6. These were identified following a formal assessment of the landscape qualities of the County and are a non-statutory designation. It is noted that this policy places an emphasis on enhancement and improvement. There may be opportunities to supplement and/or review the supporting evidence for this policy and explore those wider linkages (e.g. the renewable energy policies and those design related policies).

<b>Which Tests of Soundness would these revisions to the LDP address?</b>	
<b>1. Does the Plan have regard to national policy?</b>	✓
<b>2. Does it seek to meet the assessed needs?</b>	✓
<b>3. Will development be viable?</b>	✓

## **SP15 Tourism and the Visitor Economy**

### **Context**

Tourism is important to the Carmarthenshire economy. The County's outstanding natural and cultural characteristics provide the basis for further growth. Sustainable tourism developments are, where appropriate, encouraged and supported where they increase quality and viability and contribute towards enhancing the diversity and economic sustainability of the County's tourism offer. Proposals should not however adversely affect the area's landscape, nature conservation or built environment qualities and should be consistent with the settlement hierarchy.

The LDP acknowledges that tourism plays an important role in Carmarthenshire –with the County being home to large scale regional attractions such as the Millennium Coastal Park, Ffos Las Racecourse, the National Botanic Gardens and the Brechfa Forest, which is renowned for high quality outdoor activities such as mountain biking.

Tourism and the Visitor Economy is not subject to a monitoring indicator within the Plan's monitoring framework. The Monitoring Framework does however provide some contextual changes that are relevant. Reference will also be made to emerging evidence being prepared, most notably the Employment Sectoral Study which considers the role of tourism

within the wider Carmarthenshire economy. Further consideration is also being given to the ongoing and potential future contribution of the rural economy and rural tourism.

In terms of contextual changes, it is noted that Transformations: A Strategic Regeneration Plan for Carmarthenshire – 2015-2030 identifies the County as an integral component of the Swansea Bay City Region. It sets out a vision for the tourism economy which is *“To develop a prosperous visitor economy in Carmarthenshire based on its unique strengths and character, which generates higher spend and local income, enhances its image and reputation and improves the quality of life for local communities.”*

In delivering the above Vision it is recognised that there are a range of issues that will need to be addressed. These include countering seasonality, increasing spend and duration of stays, unlocking service sector / job creation opportunities and maximising upon emerging markets. The role of the policies and provisions of the Plan in delivering the ambitions as part of an integrated approach will be essential. In this respect the revised Plan will integrate with other plans and strategies to ensure the opportunities for delivery are maximised.

### **LDP Strategic Implications**

Policy SP15 provides the overarching framework for the consideration of tourism related development and provides the key principles to which the Plan will adhere to in terms of location, scale and impact of any development proposal. It also provides the means to consider any proposals within the context of the County’s tourism hierarchy.

In this regard the inter-relationship between the tourism hierarchy and that of the Plan’s spatial strategy and settlement hierarchy is readily apparent. Any revision to the Plan’s spatial strategy which would have implications for tourism should be undertaken within the context of national policy and the sustainability framework. Such a review could lead to an increased appreciation of an area’s role and function in relation to tourism as opposed to simply identifying its position in a hierarchy.

Regard will be had to the potential tourism opportunities of the Pembrey Peninsula.

### **Specific Policies - Tourism**

There is an opportunity to elaborate upon the existing policy framework to develop a contemporary awareness of market trends (and local distinctiveness) without rendering the Plan unsound and/or contrary to the sustainability framework. Consideration will be given to

the development of SPG which provides an opportunity to elaborate upon the policies and provisions of the Plan. The potential for regional co-operation will be explored where there may be matters of common interest.

There is presently an evidence gap in terms of current and future demand / trends (both in accommodation and attractions) and where such uses could be broadly accommodated on a spatial basis. There are also opportunities to review those linkages and opportunities that emerge from the corporate emphasis on exploring the future contribution of the rural economy as well as at a regional level.

<b>Which Tests of Soundness would these revisions to the LDP address?</b>	
<b>1. Does the Plan have regard to national policy?</b>	✓
<b>2. Does it seek to meet the assessed needs?</b>	✓
<b>3. Will development be viable?</b>	✓

## **SP16 Community Facilities**

### **Context**

The LDP's evidence base included an audit of existing community facilities with their location reflected in the LDP's settlement hierarchy and through the distribution of growth. The current LDP Strategy is underpinned by the principles of sustainability and as such in considering the distribution of growth and settlement hierarchy in Carmarthenshire, the availability of facilities was a significant influence due to its ability to contribute towards the sustainability and well-being of Carmarthenshire's communities, as well as minimising the need for car journeys and consequential impact upon climate change.

The nature, range and level of community facilities present, along with a number of other pertinent factors, informed the identification of the settlement hierarchy. Revised evidence in relation to the role and function of settlements will assist in informing any re-evaluation of a respective settlements role.

The availability and access to facilities and services can be significant contributors towards the achievement and delivery of the Well-being of Future Generations (Wales) Act 2015 well-being objectives. Most notably this would include contributing towards delivering 'A

Wales of cohesive communities’, ‘A resilient Wales’ and more notably achieving social resilience.

### LDP Strategic Implications

There are not considered to be any notable issues in relation to compatibility and consistency with the LDP strategy. The Strategy needs to reflect the current role which various facilities play within the communities and the impact these have upon the sustainability of the communities. It is therefore considered appropriate to review our understanding of the role and function of settlements and their various facilities.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

## SP17 Infrastructure

### Context

The LDP evidence base provides a foundation of information including the Infrastructure Background Paper (July 2013) which specifically discusses the infrastructure required in Carmarthenshire in order to facilitate the delivery of the LDP. This Paper principally addresses the infrastructure needed to enable the delivery of development and to consider possible mechanisms for delivering the infrastructure identified (e.g. highway / utility infrastructure).

Since the adoption of the LDP further work has been undertaken to consider the suitability of adopting a Community Infrastructure Levy (CIL) in Carmarthenshire. In September 2016, a CIL Infrastructure Assessment Paper was produced to update the existing infrastructure evidence, and to consider a wider range of infrastructure types, including the infrastructure needed to support growth as well as to facilitate development. Where possible, the Paper also identified the infrastructure costs and potential sources of funding.

Further to this, an assessment of infrastructure provision and needs is being undertaken and will be utilised to support the revision of the LDP.. This assessment will identify the existing capacity of the services within these areas and any planned improvements to be undertaken by infrastructure providers. The Plan’s Strategy and the distribution of growth will need to reflect the availability of existing and planned infrastructure. The selection of sites will need

to consider the infrastructure available, the requirement for improvements programmed improvements and where there are likely to be insurmountable issues in relation to delivery of the site as a result of infrastructure provision and the potential implication on the financial viability of the site.

The LDP will have regard to the utility providers' most recent plans for improvements and the availability of funding so that infrastructure and development will be aligned. Where there is limited capacity and no improvements programmed, there will be a need to work closely with infrastructure providers during the production of the Plan to identify solutions collaboratively to ensure that the Plan and its allocations are deliverable.

### LDP Strategic Implications

The LDP's Strategy and Settlement Hierarchy will need to recognise the inter-dependency of delivering allocated sites and the need for an infrastructure network which is fit for purpose to facilitate the delivery of the LDP. The revised LDP will be developed to ensure its content including the distribution of growth is deliverable.

### Specific Policies – Infrastructure

Policies GP3 Planning Obligations and GP4 Infrastructure and New Development aim to ensure the delivery of suitable infrastructure necessary to facilitate appropriate development. There are no notable issues relating to these policies. Provided that there is ongoing liaison and cooperation between the LPA and the infrastructure providers then the policies should remain sufficiently flexible and effective.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

## SP18 The Welsh Language

### Context

The LDP was informed by trends relating to the use of the Welsh language. In particular this considered the changes in the proportion and number of Welsh speakers in Carmarthenshire. This data was further supplemented with demographic data and trends in Carmarthenshire.



With 78,048 Welsh speakers amongst its population, Carmarthenshire has the highest number of Welsh speakers in Wales and the fourth highest proportion of Welsh speakers at 43.9% (2011 Census data). However, the Census data also indicated that there is a significant variation in the proportion of Welsh speakers across the communities of Carmarthenshire.

Since the adoption of the LDP section 31 of the Planning (Wales) Act 2015 has amended section 70(2) of the Town and Country Planning Act 1990 to clarify that considerations relating to the use of the Welsh language may be taken into account when determining applications for planning permissions, so far as they are material to the application.

In addition to this legislative amendment, the Well-being of Future Generations (Wales) Act 2015 sets out 7 well-being goals which Carmarthenshire County Council as a local authority must seek to achieve in order to improve well-being both now and in the future. One of the well-being goals is 'A Wales of vibrant culture and thriving Welsh language'.

The LDP will need to have regard for well-being and should reflect national and local well-being objectives and priorities and align with the LWP. It will also need to acknowledge the status of the language as a consideration in the determination of planning applications.

The evidence informing the revision of the LDP will need to consider the likely effects of the LDP on the Welsh language and will be a requirement of the SA. The SA will need to consider the effects of the Plan on local communities as well as on a countywide level.

TAN 20: Planning and the Welsh Language was published in October 2017 which outlines the development in legislation relating to the language as well as changes relating to the use of language impact assessments. The TAN also outlines guidance relating to the consideration of the Welsh language in the SA of the LDP.

### **LDP Strategic Implications**

The SA will need to consider the effects of the LDP's Strategy and its policies and site allocations on the Welsh language. The LDP will have regard to the LWP, emerging evidence and any other local strategies which will inform and guide the LDP's approach to supporting the Welsh language in the local communities and on a countywide basis.

## Specific Policies – Welsh Language

There are no specific policies which relate solely to the matter of the Welsh language and development. However, Policy GP5 Advertisements makes provision for the safeguarding and enhancement of the Welsh language. There are no notable issues with this policy. Whilst there are currently no other specific policies which relate to the Welsh language, it is noted that there may potentially be a requirement to address the need for mitigation and / or language impact assessments given the changes in legislation. The Plan will also need to be responsive to up to date and available evidence as well as the outcomes of the sustainability appraisal of the revised LDP.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

- **Specific Policies, Proposals Map and Site Specific**

The following section considers the potential implications of the review process in respect of the following specific policy areas. Further reference should also be made to those policy areas considered above where they relate to strategic policies and other strategic matters. The following is not intended to be an exhaustive list of potential issues, rather it provides an overview of known and emerging considerations and an indication of matters to be reviewed through the revision of the Plan.

### General Policies

#### Context

On 7 June 2016 the UK Government published the Wales Bill with the intention to amend the Government of Wales Act 2006. The Bill received Royal Assent as the Wales Act 2017 on 31 January 2017. As part of the Wales Act 2017 CIL became a devolved matter with powers anticipated to be transferred to the Welsh Government in April 2018. A Transfer of Functions Order will be necessary to allow Welsh Ministers to modify existing secondary legislation. If the Welsh Ministers then consider it appropriate to rewrite the CIL Regulations, it is possible that further legislation may be required to enable this, however, this has not been confirmed.

Consequently, given the absence of clarity, the Council has resolved to hold its preparation of a CIL in abeyance. With this in mind the future progress of CIL within a Welsh context will be monitored and responded to accordingly.

In preparing the revised LDP, reference will be made to evidence prepared as part of the preparation of CIL. In this respect reference will be made to the report by the District Valuer Service – Valuation Office Agency on economic viability study for Carmarthenshire (November 2015)<sup>8</sup> and the CIL Background Paper: Infrastructure Assessment<sup>9</sup>. Both studies will be reviewed and where applicable and appropriate updated to support the revised LDP.

The LDP, in setting out and delivering policies in relation to Planning Obligations, will ensure compliance with the requirements of the CIL Regulations 2010. Consideration will, in light of the provisions of these regulations and that pertaining to viability and deliverability, be given to the potential for the prioritisation of any obligations sought. The requirements in relation to the CMMSAC are noted, with the current LDP prioritising this contribution accordingly.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

## Environmental Protection

### Context

In relation to the Carmarthen Bay / Burry Inlet Special Area of Conservation (CBEEMS), there remains a multi-agency approach to addressing those concerns in relation to water quality and localised flooding. Dŵr Cymru/Welsh Water (DCWW), Natural Resources Wales, City and County of Swansea and Carmarthenshire County Council remain signatories to the Memorandum of Understanding (MoU)<sup>10</sup>. Progress has been made in relation to reviewing the MoU, with the signatory local authorities agreeing a revised draft. Reference is made to the HRA that accompanied the LDP. Consideration will be given to the requirement for a specific policy in relation to the Burry Inlet MoU in any revised LDP. This would be in

<sup>8</sup> <http://ilocal.carmarthenshire.gov.uk/media/96628/Study-into-the-Viability-of-Charging-CIL-Background-Document.pdf>

<sup>9</sup> <http://ilocal.carmarthenshire.gov.uk/media/96610/Infrastructure-Assessment-Report-Background-Document.pdf>

<sup>10</sup> Memorandum of Understanding – Burry Inlet (2011)

recognition of the role of the MoU in mediating developmental aspirations with environmental considerations at a strategically important location.

In contextual terms, reference is made to the fact that, in March 2014, DCWW published its Water Resources Management Plan. This outlines a 25-year strategy for managing water resources across the supply area and maintaining the balance between supply and demand. It identifies deficit zones where demand is exceeding, or forecast to exceed, supply and identifies appropriate measures to either increase supply or to manage demand in each water resources zone. Reference is made to LDP Policy SP17 and DCWW’s planned investments through their Asset Management Programme (AMP).

Due regard will need to be given to the potential mandatory standards for Sustainable Drainage Systems and the opportunities to reflect the content of the Design and Placemaking SPG. Consideration will also need to be given to any revision of TAN 15. There is a need to reflect the fact that Air Quality Management Areas (AQMA) have been designated in Llanelli, Carmarthen and Llandeilo and reference made to evidence in relation to air quality including the Carmarthenshire Air Quality Progress Report<sup>11</sup>.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

## Recreation and Leisure

### Context

The specific policies of the LDP relate particularly to the retention and provision of open space. The presence of existing parks and leisure facilities were considered as part of the assessment of community facilities referred to under SP16 Community Facilities above. The information was collated as part of the Carmarthenshire Greenspace Assessment (2010) which informed the production of the LDP. In order to provide additional guidance, SPG was also produced in 2016 on the Leisure and Open Space Requirements for New Developments.

<sup>11</sup> [http://www.carmarthenshire.gov.wales/media/1035672/2014\\_Air\\_Quality\\_Progress\\_Report\\_ENG.pdf](http://www.carmarthenshire.gov.wales/media/1035672/2014_Air_Quality_Progress_Report_ENG.pdf)

Given that the parks and open space evidence is largely based upon a study undertaken in 2010, it is considered prudent to review the assessment to ascertain its ongoing relevance and accuracy; it is considered likely that the information may require updating. The Greenspace Study previously focused on the larger settlements located in the higher tiered settlements. However, given that the Sustainable Communities play a significant role in delivering the LDP's aims and objectives, it is considered appropriate to extend the greenspace assessment to incorporate these settlements too.

Which Tests of Soundness would these revisions to the LDP address?	
1. Does the Plan have regard to national policy?	✓
2. Does it seek to meet the assessed needs?	✓
3. Will development be viable?	✓

## Proposals Map

The LDP Proposals Map includes a range of designations and notations which are identified specifically through the LDP but nonetheless add value in its use. Examples include notations such as areas of international and national nature conservation etc. The LDP Manual states that such designations no longer have to be included on the LDP Proposals Map and, as an alternative, can be identified on a Constraints Map (see Section 2.4, page 16 of LDP Manual). Whilst a Constraints Map is not a statutory requirement and is not part of the LDP, the LDP should reference it and list the designations it includes. The use of a Constraints Map has merits in terms of improving the legibility of an LDP Proposals Map and would allow amendments to be made readily to take account of changes that are not determined by the LDP, thus creating a more responsive basis for informing decisions. This would ensure that the most up to date information is readily available. Consideration will be given to the use of a Constraints Map as part of a revised LDP.

Regard will also be had to matters of accuracy in relation to the identification of the specific boundaries to ensure they are consistently interpreted and replicated within the LDP.

## Site Assessment and Selection

In relation to the process for the selection of sites, a revised Site Assessment Methodology will be developed and published as part of the LDP Pre-deposit stage. This will ensure that selection is reflective of the changes to, and content of PPW and the LDP Manual Edition 2.

It will also ensure that site selection ensures that appropriate levels of deliverability are identified as early as possible in the Plan making process. The Authority will need to review the housing land supply and the availability of sites having reference to the strategy and growth requirements and ensuring that a deliverable and genuinely available supply is in place to meet the new Plan timescale (2033). The site assessment process will seek to ensure that there are no fundamental impediments to the development of the sites allocated in the revised Plan and that they are reinforced by the necessary evidence to support their allocation. The authority will also seek to provide clarity in relation to the timescales within which constraints can be overcome and sites are available to come forward.

Reference should also be made to the commentary in relation to SP3 and SP5 above and to the Draft DA which further considers matters on site selection.

In undertaking the review of its LDP, the Council will consider the content of the Longitudinal Viability Study of the Planning Process and its recommendations. This report commissioned by the WG identifies reasons why proposed housing developments that are assessed as deliverable during the LDP preparation process are stalling due to viability issues at later planning stages. Regard will be had where appropriate to its recommendations in seeking to develop a deliverable housing land supply.

## **10. Sustainability Appraisal and Habitat Regulations Assessment**

### **Sustainability Appraisal – Strategic Environmental Assessment**

The requirement to undertake a SA is an integral part of the process of plan preparation and is mandatory under the Planning and Compulsory Purchase Act 2004.

European Directive 2001/42/EC is enacted in the United Kingdom through the Environmental Assessment of Plans and Programmes (Wales) Regulations 2004 requires the the undertaking of a Strategic Environmental Assessment (SEA). The first and second AMRs set out a review of the SA-SEA monitoring framework.

There have been no significant concerns relating to the impact of the LDP's implementation in relation to the SA-SEA emerging from both AMRs. The outcomes confirmed the designation of three separate AQMAs in Llandeilo, Carmarthen and Llanelli respectively. The limitations in SA-SEA monitoring are acknowledged, and whilst none of the SA-SEA indicators were deleted, there were instances when information was unavailable and/or deemed not applicable.

It is noted that many of the plans, policies and programmes reviewed as part of the SA-SEA process are some years old and that the identification and consolidation of a contemporary pre-change baseline is key to effective plan-making. Due consideration will be given to a review of the scoping report with a view to supporting the development of a relevant sustainability framework. Such a framework should inform pre-deposit proposals and the identification of strategic options.

There have also been some contextual changes that are relevant. These include the Planning (Wales) Act 2015, The Well-being of Future Generations Act 2015 and The Environment (Wales) Act 2016. In relation to the Well-being of Future Generations Act 2015 there is an opportunity to develop a corporate and integrated framework and monitoring regime as part of the production of the LWP (). TAN 20 was published in October 2017 - It outlines further guidance relating to the consideration of the Welsh language in the SA of the LDP and is a relevant consideration SA in relation to any review of the SA.

### **Habitats Regulations Assessment**

European Directive 92/43/EEC is enacted in the United Kingdom through the Conservation of Habitats and Species Regulations 2010 (HRA). These regulations clarify the responsibilities

of the Plan Making Authority and set out the framework under which it should document the process.

There are no indications from the first and second AMR reports that the implementation of the LDP is having a significant effect (alone or in-combination) on the European Sites.

Notwithstanding the above, due consideration will be given to pertinent legislative directives and any requirement to revisit the screening process.



## Glossary

Affordable Housing	<p>Housing provided to those whose needs are not met by the open market. Affordable housing should:</p> <ul style="list-style-type: none"> <li>• meet the needs of eligible households, including availability at low enough cost for them to afford, determined with regard to local incomes and local house prices; and</li> <li>• include provision for the home to remain affordable for future eligible households, or if a home ceases to be affordable or staircasing to full ownership takes place, any subsidy should generally be recycled to provide replacement affordable housing.</li> </ul> <p>This breaks down into two sub-categories:</p> <ul style="list-style-type: none"> <li>• <b>social rented housing</b> - provided by local authorities and <i>registered social landlords</i> where rent levels have regard to the Assembly Government's <i>guideline rents</i> and <i>benchmark rents</i>; and</li> <li>• <b>Intermediate housing</b> - where prices or rents are above those of social rented housing but below market housing prices or rents. This can include equity sharing schemes (for example <i>Homebuy</i>). Intermediate housing differs from low cost market housing, which the Assembly Government does not consider to be affordable housing for the purpose of the land use planning system. (TAN 2: Glossary)</li> </ul>
Annual Monitoring Report (AMR)	This will assess the extent to which policies in the local development plan are being successfully implemented (Regulation 37 of the Town and Country Planning (Local Development Plan) (Wales) Regulations 2005).
Baseline/Pre Change Baseline	A description of the present state of an area against which to measure change.
Community	People living in a defined geographical area, or who share other interests and therefore form communities of interest.
Community Infrastructure Levy (CIL)	The Community Infrastructure Levy is a planning charge, introduced by the Planning Act 2008 as a tool for local planning authorities to help deliver infrastructure to support the development of their area. It came into force on 6 April 2010 through the Community Infrastructure Levy Regulations 2010.
Community Involvement Scheme (CIS)	Sets out the project plan and policies of the LPA for involving local communities, including businesses, in the preparation of local development plans. The CIS is submitted to the Welsh Government as part of the Delivery Agreement for agreement.
Candidate Site	Candidate Sites are those nominated by anyone for consideration by the LPA as allocations in an emerging LDP.
Candidate Sites Register	Register of candidate sites prepared following a call for Candidate sites by the LPA.

Consultation	A formal process in which comments are invited on a particular topic or set of topics, or a draft document.
Contextual Indicator	An indicator used to monitor changes in the context within which the plan is being implemented or prepared.
Delivery Agreement (DA)	document comprising the LPA's timetable for the preparation of the LDP together with its Community Involvement Scheme, submitted to the Welsh Government for agreement.
Deposit Documents	These include the deposit LDP, the Sustainability Appraisal report, the initial consultation report, the candidate sites register, the Review Report (if appropriate), any relevant supporting documents.
Development Limits	A line drawn in order to define the area of a settlement within which development is acceptable in principle subject to detailed consideration of environmental, amenity, access, public service provision and other considerations. Areas outside the limits are regarded as the open countryside.
Development management policies	A suite of criteria-based policies which will ensure that all development within the area meets the aims and objectives set out in the Strategy.
Engagement	A process which encourages substantive deliberation in a community. Proactive attempt to involve any given group of people/section of the community.
Evidence Base	Interpretation of Baseline or other information/data to provide the basis for plan policy
Habitats Regulations Assessment (HRA)	<p>The screening and appropriate assessment of options required under Part 6 Chapter 8 of the Conservation of Habitats and Species Regulations 2010 (as amended) (the Habitats Regulations) - a recognised iterative process which helps determine the likely significant effect on a plan or programme and (where appropriate) assess adverse impacts on the integrity of a European site.</p> <p>The assessment is required to be undertaken by a competent authority in respect of plans or projects which are likely to have a significant effect (alone and in combination with other plans and projects) on a "European site" (see paragraph 5.1.2 of TAN 5), or as a matter of policy a proposed "European site" or Ramsar site, under the provisions of Article 6(3) of the EC Directive 92/43/ECC (the Habitats Directive), regulations 61 and 102 of the Conservation of Habitats and Species Regulations (as amended) 2010, and, regulation 25 of the Offshore Marine Conservation (Natural Habitats &amp;c) Regulations 2007.</p>
Integrated Community Strategy	Required by the Local Government (Wales) Measure 2009 (Part 2: Sections 37-46) with the aim of improving the social, environmental and economic well-being of their areas. Also referred to as a "Single Integrated Plan".
Local Development Plan (LDP)	<p>The required statutory development plan for each local planning authority area in Wales under Part 6 of the Planning and Compulsory Purchase Act 2004.</p> <p>A land use plan that is subject to independent</p>

	examination, which will form the statutory development plan for a local planning authority area for the purposes of the Act. It should include a vision, strategy, area-wide policies for development types, land allocations, and where necessary policies and proposals for key areas of change and protection. Policies and allocations must be shown geographically on the Proposals Map forming part of the plan.
Local Planning Authority (LPA)	A planning authority responsible for the preparation of an LDP.
Local Well-being Plan	Under The Well-being of Future Generations (Wales) Act 2015 Public Service Boards will be established for each local authority area; it is intended that each will prepare a Well-being Plan to replace the SIP by April 2018 (s.39).
Marine Plan	The Welsh National Marine Plan prepared under the Marine and Coastal Access Act 2009.
Mitigation	Measures to avoid, reduce or offset significant adverse effects.
National Development Framework (NDF)	Provision is made under Planning (Wales Act) 2015 for the preparation of an NDF. Prepared by the Welsh Government the NDF will set out a 20 year land use framework for Wales and will replace the current Wales Spatial Plan.
Objective/Strategic Objective	A statement of what is intended, specifying the desired direction of change in trends.
Partners	Other local/NP authority departments and statutory bodies where the LDP will help to deliver some of the objectives of their strategies. Partners may be expected to contribute to formulating relevant parts of the LDP.
Planning Obligation	A legal agreement between an applicant and the local planning authority to ensure a development is carried out in a certain way. Also referred to as a Section 106 Agreement.
Planning Policy Wales (PPW)	Planning Policy Wales sets out the land use planning policies of the Welsh Assembly Government. It is supplemented by a series of Technical Advice Notes. Procedural advice is provided through circulars and policy clarification letters.
Pre-deposit documents (LDP)	These include the vision, strategic options, preferred strategy, key policies, the Sustainability Appraisal report, the candidate sites register, Review Report (if appropriate).
Pre-deposit stage	The participation and consultation stages prior to deposit; the Manual refers to the Strategic Options and Preferred Strategy stage which relate to the full plan procedure; reduced requirements relate to the short form plan revision procedure.
Ramsar	A wetland site of international importance for nature conservation. Designation is enabled by the Ramsar Convention 1971 whereby participating European Governments undertake to protect such areas.
Review Report	The required statutory report under S69 of the 2004 Act and/or Reg41; to conclude on the LDP revision procedure to be followed based on a clear assessment of what has been considered and what needs to change and why, based on evidence.
Short form revision	May be appropriate for circumstances where the issues

procedure	involved are not of sufficient significance to justify undertaking the full plan revision procedure.
Single Integrated Plan (SIP)	Discharges statutory duties identified by Welsh Government (“Shared Purpose – Shared Delivery”, WG 2012), including Community Strategies; prepared by a Local Service Board. See “Local Well-being Plans” which are to replace SIPs”.
Site specific allocations	Allocations of sites (proposals) for specific or mixed uses or development. Policies will identify any specific requirements for individual proposals with the allocations shown on the LDP’s proposals map.
Soundness	In order to be adopted, an LDP must be determined ‘sound’ by the examination Inspector (S64 of the 2004 Act).  Tests of soundness tests and checks are identified in PPW.
Special Area of Conservation (SAC)	Sites of international conservation importance designated by the Welsh Ministers under the European Directive on the Conservation of Natural Habitats and Wild Flora and Fauna. In addition there are candidate SAC’s which should, as a matter of Government policy, be viewed as full SAC’s when examining land use impacts.
Special Protection Area (SPA)	Special Protection Areas For Wild Birds under The E.C. Council Directive On the Conservation of Wild Birds (79/4C9/EEC) provides for the protection, management and control of all species of naturally occurring wild birds.
Stakeholders	Interests directly affected by the LDP (and/or SEA) - involvement generally through representative bodies.
Statement of Common Ground (SocG)	The purpose of a SOCG is to establish the main areas of agreement between two or more parties on a particular issue.
Strategic Development Plan (SDP)	Provision is made under the Planning (Wales) Act 2015 for the preparation of SDP’s at a regional level. SDP will have regard to the NDF and responding at a regional level to strategic issues.
Strategic Environmental Assessment (SEA)	Term used internationally to describe environmental assessment as applied to plans and programmes. SEA process is derived from European legislation and defined at European level – Directive 2001/42/EC. The Environmental Assessment of Plans and Programmes (Wales) Regulations 2004 (SEA Regulations) require a formal “environmental assessment of certain plans and programmes, including those in the field of planning and land use”.
Supplementary Planning Guidance (SPG)	Forms a supplementary document/information in respect of the policies in an LDP. SPG does not form part of the development plan and is not subject to independent examination but must be consistent with the Plan and with national planning policy.  Can be developed to consider individual or thematic aspects of the Plan and site allocations including masterplans.

Sustainability Appraisal (SA)	Tool for appraising policies to ensure they reflect sustainable development objectives (i.e. social, environmental and economic factors). Each LPA is required by S62(6) of the 2004 Act to undertake SA of the LDP. This form of SA fully incorporates the requirements of the SEA Regulations.
Sustainability Appraisal Report (SA Report)	document required to be produced as part of the SA process to describe and appraise the likely significant effects on sustainability of implementing the LDP, which also meets the requirement for the Environmental Report under the SEA Regulations. S62(6) of the 2004 Act requires each LPA to prepare a report of the findings of the SA of the LDP. - The SA Report is first produced at the Preferred Strategy stage (the Interim SA Report), expanded at the Deposit LDP stage and finalised alongside the Adoption Statement.
Technical Advice Notes (TAN)	A topic-based document published by the Welsh Assembly Government to supplement Planning Policy Wales.
Wales Spatial Plan (WSP)	A plan prepared and approved by the National Assembly for Wales under S60 of the 2004 Act, which sets out a strategic framework to guide future development and policy interventions, whether or not these relate to formal land use planning control. Under S62(5)(b) of the 2004 Act a local planning authority must have regard to the WSP in preparing an LDP.

## Appendix 1 – LDP Policy Review

Strategic Policies		Comments
SP1	Sustainable Places and Spaces	<p>The policy will be amended to reflect developments and changes emanating from revisions to the LDP strategy. Reference will also be had to evidence and contextual changes in ensuring the policy reflects such matters and remains relevant.</p> <p>Specific reference will be had to the emerging provisions of the Local Well-being Plan</p>
SP2	Climate Change	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p>
SP3	Sustainable Distribution- Settlement Framework	<p>The policy will be amended to reflect developments and changes emanating from revisions to the LDP strategy. The implications of the growth requirements and the spatial framework will be notable informants in this regards.</p> <p>Reference will also be had to evidence and contextual changes in ensuring the policy reflects such matters and remains relevant.</p>
SP4	Strategic Sites	<p>The policy will be amended to reflect developments and changes emanating from revisions to the LDP strategy. The implications of the growth requirements and the spatial framework will be notable informants in this regards.</p> <p>Evidence in terms of site delivery and their strategic contributions as well as the site assessment methodology will assist in determining the identification of sites.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
SP5	Housing	<p>The policy will be amended to reflect developments and changes emanating from revisions to the LDP strategy. The implications of the growth requirements and the spatial framework will be notable informants in this regards.</p> <p>Reference will be had to the site assessment methodology in the identification of sites.</p>
SP6	Affordable Housing	<p>The policy will be amended to reflect the background evidence which notes the number of affordable housing being achieved through the planning system.</p> <p>As part of the revised LDP, the percentage targets for affordable housing, along with the threshold consideration will need to be looked at in light of changes to allocated sites within the revised plan.</p>

		These factors when totalled, will ultimately show a revised number of affordable housing being provided during the plan period.
SP7	Employment- Land Allocations	<p>The policy will be amended to reflect developments and changes emanating from revisions to the LDP strategy. The implications of the growth requirements and the spatial framework will be notable informants in this regards, as will the evidence set out within the Sectoral Need Study 2017.</p> <p>Evidence in terms of site delivery and their strategic contributions, as set out within the annual Employment Land Reviews, as well as the site assessment methodology will assist in determining the identification of sites.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
SP8	Retail	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
SP9	Transportation	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy will however require amending to reflect amendments to, and emerging infrastructure improvements and notably to ensure compliance with the provisions of the Active Travel (Wales) Act.</p>
SP10	Sustainable Mineral Development	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
SP11	Renewable Energy & Energy Efficiency	No fundamental changes are anticipated to the strategic policy, the policy will have to reflect the outcomes of the Renewable Energy Assessment which will be undertaken,
SP12	Waste Management	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>Evidence and recommendations as set out within the annual Waste Planning Monitoring Reports for the South West Wales Region will be a key informant in relation to the review of this policy.</p>



SP13	Protection and Enhancement of the Built and Historic Environment	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
SP14	Protection and Enhancement of the Natural Environment	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>In this regard, there may be an opportunity to evaluate and consolidate the cross cutting role of the protection and enhancement of the natural environment across the 3 legislative themes as recognised within the following Welsh Government guidance: <a href="http://gov.wales/docs/desh/publications/160610-three-bills-diagram-en.pdf">http://gov.wales/docs/desh/publications/160610-three-bills-diagram-en.pdf</a>.</p>
SP15	Tourism and the Visitor Economy	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>In noting the above, the inter-relationship between the tourism hierarchy and that of the Plan's spatial strategy and settlement hierarchy is readily apparent. Any review of the Plan's spatial strategy (for example promoting a character area approach as oppose to a hierarchal approach) would have implications for tourism and should be undertaken with the context of national policy and the and/or the sustainability framework.</p> <p>In terms of contextual changes, it is noted that Transformations: A Strategic Regeneration Plan for Carmarthenshire – 2015-2030 portrays the County as a confident, ambitious and connected component of the Swansea Bay City Region.</p> <p>There are also opportunities to review those linkages and opportunities that emerge from the corporate emphasis on exploring the future contribution of the rural economy (including diversification and adaptation and re use of rural buildings).</p>
SP16	Community Facilities	No fundamental changes are envisaged in response to the policy's performance as shown through the Annual Monitoring Reports. The policy will however need to respond to contextual changes and adapt and reflect the information gained through further research and assessment.
SP17	Infrastructure	No fundamental changes are envisaged in response to the policy's performance as shown through the Annual Monitoring Reports. The policy will however need to respond to contextual changes and adapt and reflect the information gained through the most recent infrastructure assessment as well as further research planned.
SP18	The Welsh Language	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.



		There will be an opportunity to review the impact of development on the Welsh Language through the Sustainability Appraisal process and reflect changes implemented through TAN20.
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<b>Specific Policies</b>		
<b>General Policies</b>		
GP1	Sustainability and High Quality Design	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
GP2	Development Limits	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
GP3	Planning Obligations	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>Further consideration may however be given to the prioritisation of planning obligations. The ongoing considerations around the potential for a CIL charging structure will be monitored and reflected as appropriate.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
GP4	Infrastructure and New Development	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
GP5	Advertisements	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>

GP6	Extensions	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy. The Policy may also be amended to improve its clarity and certainty in application.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
<b>Housing</b>		
H1	Housing Allocations	<p>Whilst the policies basic provisions will not defer the detail in relation to the table of allocations will require amending to reflect any changes arising from the revision of the Plan.</p>
H2	Housing within Development Limits	<p>The policy will be required to respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The provisions of part b of the policy will be reviewed in light of any re-assessment of the approach in relation to the type of settlements to which it refers. Regard will be had to the Plans strategy and settlement framework.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
H3	Conversion or Subdivision of Existing Dwellings	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
H4	Replacement Dwellings	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
H5	Adaptation and Re-use of Rural Buildings for Residential Use	<p>The provisions of the policy will be reviewed noting the rural context of much of the County. This will ensure the policy responds appropriately to rural housing needs and tourism potential.</p> <p>The policy will also respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>

H6	Residential Care Facilities	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
H7	Gypsy and Traveller Sites	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The policy will need to consider an updated Gypsy and Traveller Accommodation Needs Assessment to ascertain if there is a requirement for a new local authority site within Carmarthenshire.</p>
H8	Renovation of Derelict or Abandoned Dwellings	<p>The policy will be subject to review in responses to contextual (including legislative and policy), factual and evidential changes as well as those resulting from any revisions to the strategy. It will also be subject to further development reflecting considerations around the rural matters across the County.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
H9	Residential Caravans	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
H10	Home Working	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
<b>Affordable Housing</b>		
AH1	Affordable Housing	<p>There will be a requirement to update the affordable housing targets in conjunction with the background evidence on affordable housing within any revised LDP. This may involve a strategic consideration on setting the affordable housing target, or to consider individual site thresholds.</p> <p>In respect of the commuted sum contributions, the revised LDP will need to identify the threshold at which to consider the provision of commuted sums, in addition to the level of commuted sum required up until the threshold is achieved for on-site affordable housing contribution.</p>

AH2	Affordable Housing- Exceptions Sites	It is considered that the criteria set out within the policy is fit for purpose. Reference will need to be drawn in any revised LDP to those settlements to which market housing allocations have not been directed. The Policy and the supporting paragraphs should be explicit in understanding the requirements set out within the policy.
AH3	Affordable Housing- Minor Settlement in the Open Countryside	The revised LDP will provide an opportunity to consider the criteria set within policy AH3 with respect to genuine identified local need and those seeking infill developments for affordable housing outside of development limits.
<b>Economy and Employment</b>		
EMP1	Employment- Safeguarding of Employment Sites	Whilst no fundamental changes are envisaged, this policy is closely linked to the employment allocations policy SP7 and the resultant potential changes associated with that policy (see SP7 above). Furthermore, this policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
EMP2	New Employment Proposals	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
EMP3	Employment- Extensions and Intensification	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
EMP4	Farm Diversification	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>In noting the above, the inter-relationship between tourism and the rural economy is readily apparent. There are opportunities to review these linkages, and opportunities that emerge from exploring the future contribution that tourism can make to the rural economy, particularly through farm diversification.</p> <p>In terms of contextual changes, it is noted that Transformations: A Strategic Regeneration Plan for Carmarthenshire – 2015-2030 portrays the County as a confident, ambitious and connected component of the Swansea Bay City Region. There are opportunities to explore the potential of ensuring that the positive effects of the City Deal is felt throughout the County.</p>
EMP5	Mixed Use Sites	The policy will be amended to reflect developments and changes emanating from revisions to the LDP strategy. The implications of the growth requirements and the spatial framework will be notable informants in this regard.

		<p>Evidence in terms of site delivery, appropriateness as mixed use sites, and their potential strategic contributions, as well as the site assessment methodology, will assist in determining the identification of sites.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
<b>Retailing</b>		
RT1	Retailing Hierarchy	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application. The designation of the specific centres listed will also be reviewed in light of their retail contribution.</p>
RT2	Principal Centres (Growth Areas): Primary Retail Frontage	<p>The policy will be reviewed in light of its appropriateness across all the principal retail centres. In this respect whilst the policy is fundamentally sound the revised Plan will ensure it remains relevant and able to respond to the local and national retail context. Contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy will also be made where appropriate.</p> <p>The Policy may also be amended to improve its clarity and certainty in application. The spatial extent of any designation will also be reviewed.</p>
RT3	Principal Centres (Growth Areas): Secondary Retail Frontage	<p>The policy will be reviewed in light of its appropriateness across all the principal retail centres. In this respect whilst the policy is fundamentally sound the revised Plan will ensure it remains relevant and able to respond to the local and national retail context. Contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy will also be made where appropriate.</p> <p>The Policy may also be amended to improve its clarity and certainty in application. The spatial extent of any designation will also be reviewed.</p>
RT4	Principal Centres (Growth Areas): Town Centre Zone	<p>The policy will be reviewed in light of its appropriateness across all the principal retail centres. In this respect whilst the policy is fundamentally sound the revised Plan will ensure it remains relevant and able to respond to the local and national retail context. Contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy will also be made where appropriate.</p> <p>The Policy may also be amended to improve its clarity and certainty in application. The spatial extent of any designation will also be reviewed.</p>

RT5	Town Centres (Service Centres)	<p>The policy will be reviewed in light of its appropriateness across all the principal retail centres. In this respect whilst the policy is fundamentally sound the revised Plan will ensure it remains relevant and able to respond to the local and national retail context. Contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy will also be made where appropriate.</p> <p>The Policy may also be amended to improve its clarity and certainty in application. The spatial extent and appropriateness of any designated centre will also be reviewed.</p>
RT6	Town Centres (Service Centres) - Convenience Stores	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
RT7	District Centres (Local Service Centres)	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
RT8	Local Shops and Facilities	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
RT9	Regional Centres (Retail Parks)	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
<b>Transport and Accessibility</b>		
TR1	Primary and Core Road Networks	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p>
TR2	Location of Development- Transport Considerations	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p>

		The Policy may also be amended to improve its clarity and certainty in application.
TR3	Highways in Developments- Design Considerations	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
TR4	Cycling and Walking	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may require consideration in light of the Active Travel (Wales) Act and the emphasis on walking and cycling. The schemes identified will require amending with non-programmed routes removed.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
TR5	Gwili Railway	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
TR6	Redundant Rail Corridors	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
<b>Environmental Qualities- Built Environment</b>		
EQ1	Protection of Buildings, Landscapes and Features of Historic Importance	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>
EQ2	Enabling Development	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>The Policy may also be amended to improve its clarity and certainty in application.</p>

<b>Environmental Qualities- Natural Environment</b>		
EQ3	Regional and Local Designations	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>There are at present no Sites of Importance for Nature Conservation Value (SINCs) defined within the plan area and there may be an opportunity for this process to take place, subject to the development of appropriate evidence.</p>
EQ4	Biodiversity	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy</p>
EQ5	Corridors, Networks and Features of Distinctiveness	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>There are opportunities to build upon the considerable emphasis placed on the importance of connectivity in the Plan by exploring and consolidating upon linkages with other policy areas (particularly those that promote green infrastructure approaches).</p>
EQ6	Special Landscape Areas	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>There may be opportunities to supplement and/or review the supporting evidence for this policy and explore those wider linkages (e.g. the renewable energy policies and those design related policies).</p>
EQ7	Development within the Caeau Mynydd Mawr SPG Area	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>In acknowledging its ongoing contribution to delivery, there may be opportunities to review the provisions of LDP Policy EQ7 (and its SPG) in terms of mechanisms and underpinning evidential facets.</p>
<b>Renewable Energy</b>		
RE1	Large Scale Wind Power	No fundamental changes are anticipated to the policy as national guidance has not changed for wind farms since the adoption of the LDP.
RE2	Local, Community and Small Wind Farms	No fundamental changes are anticipated to the policy as national guidance has not changed for wind farms since the adoption of the LDP.



RE3	Non-Wind Renewable Energy Installations	The current policy is not supportive of solar farms nor particularly supportive of embracing new technology relating to renewable energy installations. The revised policy needs to be flexible to allow for technological advances and new technologies throughout the Plan period.
<b>Environmental Protection</b>		
EP1	Water Quality and Resources	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
EP2	Pollution	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
EP3	Sustainable Drainage	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
EP4	Coastal Management	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy. The revised policy should take into account, and make reference to the Seascape Character Assessment that covers the Carmarthen Bay, Gower and Swansea Bay area.
EP5	Coastal Development	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
EP6	Unstable Land	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
<b>Recreation and Leisure</b>		
REC1	Protection of Open Space	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
REC2	Open Space Provision and New Developments	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.

REC3	Proposed New Open Space	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
<b>Tourism</b>		
TSM1	Static Caravan and Chalet Sites	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>Any review of the Plan's spatial strategy (for example promoting a character area approach as oppose to a hierarchal approach) would have implications for tourism and should be undertaken with the context of national policy and the and/or the sustainability framework.</p>
TSM2	Touring Caravan and Tent Sites	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>There is an opportunity to elaborate upon the existing policy framework to develop a contemporary awareness of market trends (and local distinctiveness) without rendering the Plan unsound and/or contrary to the sustainability framework. This could be done via the development of SPG which provides an opportunity to elaborate upon the policies and provisions of the Plan.</p>
TSM3	Small Scale Tourism Development in the Open Countryside	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>Any review of the Plan's spatial strategy (for example promoting a character area approach as oppose to a hierarchal approach) would have implications for tourism and should be undertaken with the context of national policy and the and/or the sustainability framework.</p>
TSM4	Visitor Accommodation	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>There is an opportunity to address an evidence gap in terms of current and future demand / trends (both in accommodation and attractions) and where such uses could be broadly accommodated on a spatial basis. There are also opportunities to review those linkages and opportunities that emerge from the corporate emphasis on exploring the future contribution of the rural economy (including diversification and adaptation and re use of rural buildings).</p>
TSM5	Major Tourism proposals in the Open Countryside	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.

		There is an opportunity to develop an increased appreciation of an area's role and function in relation to tourism as oppose to simply identifying its position in a hierarchy. Such an appreciation could support the provisions of this policy is assisting in framing the potential contribution of areas such as the Pembrey Peninsula to realising the delivery of the LDP and the Transformations Strategy.
<b>Minerals</b>		
MPP1	Mineral Proposals	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
MPP2	Mineral Buffer Zones	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
MPP3	Mineral Safeguarding	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>At present the extant mineral sites identified within the current LDP contribute in excess of the land bank requirement for both hard rock, and sand and gravel stipulated in MTAN 1: Aggregates. The Plan does not therefore identify new areas for future mineral working. Notwithstanding the fact that the County has sufficient permitted reserves of aggregates, PPW requires that areas to be safeguarded for their mineral resources are identified on Proposals Maps. These safeguarding areas will provide the starting point for assessing potential new areas for mineral working should the land bank situation fall below the required thresholds in the future.</p>
MPP4	Coal Extraction Operations	The policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
MPP5	Aggregate Alternatives	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
MPP6	Restoration and Aftercare of Mineral Sites	Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.
<b>Waste Management</b>		
WPP1	Nantycaws Waste Management Facility	It is not envisaged that there will be fundamental changes to this policy. The importance of the Nantycaws facility, both at the local and regional level, is set out in the Waste Planning

		<p>Monitoring Report for the South West Wales Region. Nantycaws has one of four operational landfills within the region which collectively ensure that void space capacity is currently above the threshold set out in TAN 21: Waste whereby a new landfill site would need to be considered for the region. As well as an active landfill site, Nantycaws has an In-vessel composting facility which deals with residual garden and food waste. In addition the site has a Materials Reclamation Facility to deal with its recyclable waste, and has planning permission for an Anaerobic Digestion Plant. What is clear is that the Nantycaws site will continue to be important for the future of residual waste management within the South West Wales region for the foreseeable future.</p>
WPP2	Waste Management Facilities outside Development Limits	<p>Whilst no fundamental changes are envisaged, the policy will respond to contextual (including legislative and policy changes), factual and evidential changes as well as those resulting from any revisions to the strategy.</p> <p>Evidence and recommendations as set out within the annual Waste Planning Monitoring Reports for the South West Wales Region will be a key informant in relation to the review of this policy.</p>




## Appendix 2: Delivery of LDP Housing Allocations

The following list of sites has been extracted from the Adopted Carmarthenshire LDP and details those sites allocated for residential development. The sites have been assessed using the following colour coding, with a commentary provided. It should however be noted that the sites will potentially be subject to further evaluation in accordance with the site assessment methodology as part of the preparation of the revised LDP.

It should also be recognised that not all of those sites allocated within the existing LDP will be considered appropriate and/or suitable within any revised Plan. Landowners/developers will have the opportunity to further present their sites for inclusion within the revised LDP as part of the candidate site process. In this respect, the candidate site process represents a critical opportunity in seeking the potential further re-allocation of their sites and to provide the Council with the necessary information and evidence to support the site's deliverability.

In light of the above, and the content of this review report, it should be noted that the following commentary and colour coding is indicative only and does not prejudice the potential inclusion or otherwise of individual sites in any revised Plan.

The following key provides a broad framework for the identification of the sites. Each site will however also be informed by a range of other factors, including discussions (formal and otherwise) which may have taken place – as well as the history of the site in terms of its allocation with previous development plans.

Complete and / or indicates clear progress towards delivery	
Limited indication of progress towards delivery	
No indication of progress towards delivery.	

Settlement	Map Ref	Site Name	Total Allocation	Status
Carmarthen				
	GA1/h1	Penymorfa	180	The landowner has expressed no intention to bring the allocation forward.
	GA1/h2	Adj. Bryn Meurig	43	The site is completed
	GA1/h3	Mounthill	80	74 dwellings have been completed on the site, the 5 remaining units have planning permission. The total units for the site has been reduced to 79.
	GA1/h4	Rhiw Babell	14	A long standing allocation with no recent history of any planning permissions.
	GA1/h5	Former Hospital, Priory Street	12	The site is nearing completion.
	GA1/h6	Former BT Exchange Building, Spilman Street	14	The site is under construction.
	GA1/h7	Former DJK Buildings, Pentrefelin Street	14	The site is completed.
	GA1/h8	Former Health Authority Buildings, Penlan Road	8	The site has planning permission valid in perpetuity, however, a pre-application was submitted in 2015 to make amendments to the original application. More recent discussions have been had with Development Management by potential new owners of the site.
	GA1/h9	Parc Thomas	9	Planning permission has been permitted for 4 units on the site. The site would no longer constitute an allocation.
	GA1/h10	Parc Y Delyn	35	The site is a long standing allocation, numerous planning applications have been granted on the site. A pre-application was submitted on the site in 2015.
	GA1/h11	Springfield Road	30	The site was allocated during the adoption of the LDP. The site is currently for sale and an outline planning application has been submitted, but has not yet been determined.
	GA1/h12	Land south of Pant Glas, Bronwydd Road	15	The site was allocated during the adoption of the LDP. Outline planning permission has been granted in 2016 for the site. The site is currently for sale.
	GA1/h13	Bronwydd Road (south)	45	23 units have been completed on the site. The developer is currently in discussions about the

Settlement	Map Ref	Site Name	Total Allocation	Status
				next phases of the site and is currently progressing with a PAC.
	GA1/h14	Former Coach depot, Abergwili	9	The site is now being used as a car park in connection with the hospital.
	GA1/h15	Former MAFF depot	18	Longstanding allocation. A pre-application has been submitted on the site in 2016. The landowner has said he intends progressing to an application on the site.
	GA1/h16	Ashgrove	20	A long standing allocation with no recent history of any planning permissions.
	GA1/h17	College Road (ext)	153	The site is completed.
	GA1/h18	Penybont Farm, Llysonnen Road	16	7 units have been completed on the site, extant permission exists for 9 dwellings. A pre-application was submitted last year for the remaining site.
	GA1/h19	Bronwydd Road (north)	9	The site is completed.
	GA1/h20	College Road	14	The site is completed.
	GA1/h21	Rhiw Babel extension	16	The site was allocated during the adoption of the LDP, no progress has been made to develop the site.
	GA1/MU1	West Carmarthen	1100	<p>The site forms the Planning &amp; Development Brief for West Carmarthen. Part of the site is currently under construction. That part of the site completed before the commencement of the Plan period (2018) will not contribute to meeting housing land requirement.</p> <p>The link road is nearing completion.</p> <p>The progress to date indicates that delivery during the period of the revised LDP will be achieved. Detail on the phasing of delivery will be developed.</p>
		<b>Total</b>	<b>1854</b>	
Llanelli				
	GA2/h1	Beech Grove, Pwll	10	The site was allocated during the adoption of the LDP. The landowner has stated that the site will be openly marketed for development during 2017/18.

Settlement	Map Ref	Site Name	Total Allocation	Status
	GA2/h2	Former Stradey Park	355	Permission in place and the site is being completed. Any units / capacity remaining will be considered for the revised LDP.
	GA2/h3	Glasfryn Gardens	9	Two units under construction and one unit remaining. Substantively completed - any units / capacity remaining will be considered for the revised LDP.
	GA2/h4	Llys yr Hen Felin	69	It is understood that there are ongoing exploratory discussions on this site. A pre-application consultation has been undertaken.
	GA2/h5	Former Paragon Laundry, Lakefield	7	The site is completed
	GA2/h6	Llys Arthur	5	The site is completed
	GA2/h7	Adj. Ann Street	12	The site is completed
	GA2/h8	Heol Goffa, Dimpeth	30	The site was allocated during the adoption of the LDP. There is no indication that the site is to be brought forward.
	GA2/h9	Former Garage, Marsh Street	25	Full planning permission was granted in July 2016 (19 units).
	GA2/h10	Llysnewydd, Cambrian Place Seaside	5	The site is completed
	GA2/h11	The Croft, Queen Victoria Road	5	The site is completed
	GA2/h12	Pentre Nicklaus Village	37	Substantively completed. Any units / capacity remaining will be considered for the revised LDP.
	GA2/h13	The Avenue, Morfa	60	Part of the site (circa 50%) has been completed, no firm indicator as to remainder – however there is capacity for +5 units and evidence of deliverability established.
	GA2/h14	Machynys West	205	The site is completed
	GA2/h15	The Avenue (West), Delta Lakes	60	The site forms part of wider masterplan proposals associated with the Wellness and Life Sciences Village. Further consideration will be required to ensure allocated use is reflective of the wider masterplan.
	GA2/h16	Former Stripmill, Coedcae	21	The site is completed.



Settlement	Map Ref	Site Name	Total Allocation	Status
	GA2/h17	r/o 60 Coedcae Road	5	The site was allocated during the adoption of the LDP. Planning permission has expired, with no known indication of further interest.
	GA2/h18	Land at Penallt, Stebonheath	60	The site was allocated during the adoption of the LDP. The County Council's Transportation and Highways Department have recently been commissioned to develop a Highway design for the development and oversee a topographical survey prior to marketing.
	GA2/h19	Land at Nightingale Court, Coedcae	50	The site was allocated during the adoption of the LDP. There is no indication that the site is to be brought forward.
	GA2/h20	Land at Brynallt Terrace	5	The site is completed
	GA2/h21	Land at Frondeg Terrace	69	Part of the site attained full planning permission for 24 units in 2014. This is a long standing allocation and there is no indication of commencement of development.
	GA2/h22	Bryntirion, Llanerch	34	The site is completed
	GA2/h23	Opp. playing fields, Llanerch	12	The site was allocated during the adoption of the LDP. It is understood that alternative uses are being explored at present.
	GA2/h24	Adj. Parc Brynmawr, Pentrepoeth	100	The site is a long standing allocation. Whilst there have been initial discussions relating to the site and a letter of intent from the landowner, the site's continued allocation should be subject to detailed consideration – particularly from a highways/accessibility perspective.
	GA2/h25	Marley House, Coedcae.	5	The site is completed
	GA2/h26	R/o 31A, Swiss Valley	6	Substantively completed. Any units / capacity remaining will be considered for the revised LDP.
	GA2/h27	Dafen East Gateway	150	The site was allocated for residential during the adoption of the LDP, however it does not appear that any progress is being made in relation to bringing forward a residential development scheme.
	GA2/h28	Adj Cilsaig Farm, Dafen	8	The site is completed
	GA2/h29	Southern Unit, AVON Inflatables, Dafen	60	The site has been brought forward for employment related uses and as such its continued allocation for housing would appear inappropriate.

Settlement	Map Ref	Site Name	Total Allocation	Status
	GA2/h30	Adj. Gors Fach, Penceiliogi, Dafen	185	The site has been subject to a Masterplan which has been developed by the landowner to use as a marketing document to sell.
	GA2/h31	Land off Bryncoch, Penceiliogi, Dafen	125	The site has been subject to a Masterplan which has been developed by the landowner to use as a marketing document to sell.
	GA2/h32	Bryncoch West, Dafen	15	The site was allocated during the adoption of the LDP. No pre-application / applications have been submitted on the site, however there has been a statement of intent received from the landowner.
	GA2/h33	Bryncoch East, Dafen	26	The site was allocated during the adoption of the LDP. The site is identified within the Local Housing Authority's Social Housing Development Strategy. Planning permission was S/25729 (Outline) appears to have lapsed (2011).
	GA2/h34	Land at rear of 45-79 Pemberton Road	9	The site was allocated for residential during the adoption of the LDP. Outline planning permission for the whole site with a Variation of Condition for extension of time granted 2016. A recent outline application for three units has been granted.
	GA2/h35	Land at Maesarddafen Road/ Erw Las, Cefncaeau	300	The site was allocated for residential during the adoption of the LDP. A Pre-Application Consultation has been completed. It is expected that the proposal for 280 residential units will be placed before Planning Committee early in 2018.
	GA2/h36	Former Church, Llwynhendy Road	13	The site is completed
	GA2/h37	Land at Parc Gitto/Llwynhendy Road	30	The site is a long standing application. It does not appear that any progress is being made in relation to bringing forward a residential development scheme.
	GA2/h38	Former Glynderwen Factory, Llwynhendy rd.	8	The site was allocated during the adoption of the LDP. It is understood that there have been initial discussions, however no pre-application / applications have been submitted on the site.
	GA2/h39	Penllwynrhodyn Road, West, Llwynhendy	11	The site was allocated during the adoption of the LDP. No pre-application / applications have

Settlement	Map Ref	Site Name	Total Allocation	Status
				been submitted on the site. There has been a response to the land owner letter, however this did not state a particular intention for the site.
	GA2/h40	Penllwynrhodyn Road, East, Llwynhendy	25	The site was allocated during the adoption of the LDP. One unit has had planning permission on the site's frontage and there was an enquiry in 2015 on the whole allocation - however no planning application was submitted.
	GA2/h41	Ynys Las, Cefncaeau	45	The site was allocated during the adoption of the LDP. A planning brief has been prepared as part of the landowners marketing of the site for disposal. Reference is made to the progress made on adjacent site GA2/h35.
	GA2/h42	Bwlch Farm, Bynea	5	The site is completed
	GA2/h43	Clos Y Gerddi, Bynea	43	The site is completed
	GA2/h44	Ffordd y Gamlas, Yspitty Rd, Bynea	63	The site is completed
	GA2/h45	Genwen Road, Bryn	150	Longstanding allocation - The vast majority of the site had a reserved matters permission in 2017.
	GA2/h46	Llys Pendderi, Bryn	200	Longstanding allocation - The vast majority of the site had a reserved matters permission in 2017.
	GA2/h47	Pantbryn Isaf, Trallwm	65	The site is completed
	GA2/h48	North of Clos Pendderi, Bryn.	137	The site is completed
	GA2/h49	Maes Y Bryn, Bryn	46	Longstanding allocation - It is understood that initial exploratory discussions have taken place regarding the site, however no application has been submitted. There is evidence of deliverability from a previous phase.
	GA2/h50	Box Farm, Llangennech	8	The site had an outline planning permission in May 2017. The site was a new allocation at the adoption of the LDP
	GA2/h51	Aber Lluchwr, Llangennech	56	The site is being developed on a plot by plot basis. Substantively completed - any units / capacity remaining will be considered for the revised LDP.

Settlement	Map Ref	Site Name	Total Allocation	Status
	GA2/h52	Golwg Yr Afon, Llangennech	50	The site was a new allocation at the adoption of the LDP. The developer has cleared the site in anticipation of disposal. There is potential for a planning brief to be formulated. There may be a requirement to monitor the position in terms of DCWW AMP investment.
	GA2/h53	Opposite Parc Morlais, Llangennech	30	The site was a new allocation at the adoption of the LDP. It is understood that there have been exploratory discussions, however no applications have been submitted on the site. There may be a requirement to monitor the position in terms of DCWW AMP investment.
	GA2/h54	Maesydderwen, Llangennech	8	The site was a new allocation at the adoption of the LDP. The site has an outline planning permission which was approved in February 2017.
	GA2/h55	Brynnefys, Furnace	70	The site was a new allocation at the adoption of the LDP. A planning brief has been prepared as part of the landowner's marketing of the site for disposal.
	GA2/h56	Llys Y Bryn, Penceiliogi	145	The site has been subject to a Masterplan which has been developed by the landowner to use as a marketing document to sell.
	GA2/h57	Dylan, Trallwm	25	The site was a new allocation at the adoption of the LDP. A Pre-Application Consultation has been undertaken on the site. The site is within the County Council's Phase 1 New Build Programme.
	GA2/MU2	Former DRAKA site, Copperworks Rd	150	Part of the site is occupied by the new Penrhos School. The landowner has confirmed intent in relation to the remainder of the site and is assessing options. There will be a need to review capacity and / or landowner aspirations moving forward.
	GA2/MU4	Trostre Gateway	70	It is understood that the landowner has agreed terms to sell part of the site, subject to planning, for non-residential uses. It is understood that discussions are taking place with adjoining landowner to bring forward the residential development.

Settlement	Map Ref	Site Name	Total Allocation	Status
	GA2/MU7	North Dock	335	<p>A previous phase of residential development has long since been completed. There is a requirement to monitor the progress being made in bringing forward further residential development in accordance with the Adopted SPG.</p> <p>It is understood that the former Pontrilas building is subject to a demolition notification and consultants have been appointed to formulate a planning application for residential development, albeit the density proposed may reflect shifting market demand.</p>
		<b>Total</b>	<b>3927</b>	
<b>Ammanford / Betws</b>	GA3/h1	North End Garage Bonllwyn	15	The site is completed
	GA3/h2	Residential Caravan Park, Henry Lane	9	The site represents a longstanding allocation and has not shown sufficient progress towards delivery.
	GA3/h3	Myddyfnych Farm	121	The site is completed
	GA3/h4	North of Church Street	27	The site represents a longstanding allocation and has not shown sufficient progress towards delivery.
	GA3/h5	46-50 College Street	18	The site is completed
	GA3/h6	Former Police Station	12	The site is the subject of a retail proposal with four flats on the upper floor. Whilst this provides an element of residential provision on an allocated site it would constitute a small site.
	GA3/h7	Viji Garage, High Street	20	The site was a new allocation at the adoption of the LDP. The site was subject to planning consent which has now expired. The site is currently in operation for an alternative use.
	GA3/h8	Lon Ger y Coed / Wernoleu Road	14	The site represents a longstanding allocation and has not shown sufficient progress towards delivery.

Settlement	Map Ref	Site Name	Total Allocation	Status
	GA3/h9	Former Betws Colliery	226	The site represents a longstanding allocation. Site has previously had planning permission which has now expired. The remaining element does however part of a broader redevelopment masterplan.
	GA3/h10	Land at Colonel Road	6	The site was a new allocation at the adoption of the LDP. Less than 5 plots remaining, review capacity of the site
	GA3/h11	Land at Woodlands Park	8	The site is completed
	GA3/h12	Land at r/o No 16-20 & No 24-30 Betws Road	8	The site was a new allocation at the adoption of the LDP. The site has permission and development has commenced.
	GA3/h13	Former petrol station, Wind Street	11	The site was a new allocation at the adoption of the LDP. Proposals including pre-application discussions indicate progress towards the delivery of the site.
	GA3/h14	Land Opposite Plough and Harrow, Betws	9	The site was a new allocation at the adoption of the LDP. Site was subject to planning permission which has now expired
	GA3/h15	Land at Waungron Road and Colonel Road	6	The site was a new allocation at the adoption of the LDP. Site was subject to planning permission which has now expired
	GA3/h16	Land at Gwynfryn Fawr	106	The site represents a longstanding allocation. The majority of the site has been developed for a mix of residential development and a residential care home. The remainder of the site has consent for 28 dwellings.
	GA3/h17	Tirychen Farm	250	The site represents a longstanding allocation. The site has outline planning permission
	GA3/h18	Land at Maesyrfhaf	19	The site represents a longstanding allocation and has been substantively delivered.
	GA3/h19	Land adj. Parc Fferws	27	The site was a new allocation at the adoption of the LDP. The site is substantively complete.
<b>Tycroes</b>	GA3/h20	Hafod Road	24	The site is completed.
	GA3/h21	D.Coaches Depot, Tycroes Road,	7	The site is completed.
	GA3/h22	Land at Fforest Fach	20	The site represents part of a longstanding allocation. The remainder of the site has planning permission.

Settlement	Map Ref	Site Name	Total Allocation	Status
	GA3/h23	Land at Heol Ddu	127	The site was a new allocation at the adoption of the LDP for residential. The site has outline planning permission.
	GA3/h24	Land Adj Pontardulais Road	5	The site is completed.
<b>Capel Hendre</b>	GA3/h25	Delfryn Estate	15	The site represents part of a longstanding allocation. The site does not have planning permission however a pre-application enquiry was received in 2016.
	GA3/h26	Land adj. Llys Newydd Nursing Home	25	The site represents a longstanding allocation. The site does not have planning permission.
<b>Saron</b>	GA3/h27	Adj. Nantyci	27	Site under construction
	GA3/h28	Land to the r/o No. 152 Saron Road	17	The site is completed
<b>Llandybie</b>	GA3/h29	Land off Llys y Nant	9	The site has planning permission for a number of units granted on a plot by plot basis
	GA3/h30	King's Road	22	Planning permission has now lapsed and the site is a longstanding allocation
	GA3/h31	Adj. Primary School	32	The site is under construction
	GA3/h32	Land adj. Maespiode	42	The site was a new allocation at the adoption of the LDP for residential. The site does not have planning permission
<b>Blaenau / Caerbryn</b>	GA3/h33	Land adj. Penygroes Road	17	The site forms part of a longstanding allocation. The frontage of the site has been granted planning permission but there is no indication that the majority of the site to the rear is to be developed.
<b>Penygroes</b>	GA3/h34	Adj. Caerbryn Road, Penygroes	24	The site is completed
	GA3/h35	Adj. Pant y Blodau	90	The site is subject to full planning permission.
	GA3/h36	Adj. Clos y Cwm	12	The site forms a longstanding allocation and does not have planning permission.
	GA3/h37	Clos y Cwm	17	The site forms part of a larger area granted consent in 2005. The majority of the dwellings have been completed however 5 units proposed for the remaining area of land remain unbuilt. The landowner has noted that they wish to sell the site rather than develop it.
	GA3/h38	Land at Waterloo Road	59	The site has planning permission and is partly under construction

Settlement	Map Ref	Site Name	Total Allocation	Status
	GA3/h39	Land at junction of Black Lion Road and Gorsddu	26	The site is completed
<b>Castell y Rhingyll</b>	GA3/h40	Land adj. A476 (The Gate)	9	The site was granted reserved matters permission in 2009 and is under construction. 5 plots are remaining, one of which is under construction.
<b>Gorslas</b>	GA3/h41	Grove Hill Park	13	The site is nearing completion.
	GA3/h42	R/O Maesygrug, Llandeilo Road	7	The site was a new allocation at the adoption of the LDP. The site does not have planning permission.
	GA3/h43	Land at Ffordd Werdd	10	The site is completed
	GA3/h44	Part of Breaker's Yard and adj. Former garden centre	45	The site was a new residential allocation at the adoption of the LDP. Part of the site has been delivered. Of the remaining part, a section has consent. There is no planning permission for the western portion of the site. The landowner has indicated that they intend to develop the site and so further information / evidence of this will be needed.
<b>Cross Hands</b>	GA3/h45	Opp. Ty Newydd Terrace	56	The majority of the site is completed.
	GA3/h46	Adj. Maesyrfhaf	10	The site forms a longstanding allocation. An application for full planning permission is currently pending.
	GA3/h47	Adj. Pantgwyn	65	The site forms a longstanding allocation. The site has outline planning consent.
	GA3/h59	North of Primary School, Carmarthen Road	105	The site forms a longstanding allocation. Part of the site has been developed and preliminary discussions are ongoing.
	GA3/h60	Land to the rear of Gwernllwyn, Cross Hands Road	30	The site was a new allocation at the adoption of the LDP. An application was submitted on this site but not yet determined. The landowner has indicated that they have no plans to develop the land in the near future.
<b>Cefneithin</b>	GA3/h48	Land at Heol y Dre	9	The site is completed
	GA3/h49	Treventy Road (East)	41	The site is completed
	GA3/h50	Pt Heol Rhosybonwen	14	The site is completed
<b>Drefach (Tumble)</b>	GA3/h51	Land at Bron-yr-Ynn	36	The site forms a longstanding allocation. Outline application pending.
	GA3/h52	Land off Heol Caegwyn	8	The site was a new allocation at the adoption of the LDP. The site is not subject to planning



Settlement	Map Ref	Site Name	Total Allocation	Status
				permission however there has been a pre-application enquiry.
	GA3/h53	Nantydderwen	33	The site forms a longstanding allocation. The site does not have planning permission.
<b>Tumble</b>	GA3/h54	Rhydycerig Estate, Derwen Road	10	The site forms a longstanding allocation. The site has full planning permission, and the road access is in place.
	GA3/h55	Land at r/o No 56 Gwendraeth Road	8	The site was a new allocation at the adoption of the LDP. The site was granted outline consent.
	GA3/h56	Land at factory site between No 22 & 28 Bethesda Road	30	The site was a new allocation during the adoption of the LDP. The site was granted outline permission for residential development.
	GA3/h57	Ravelston Court	8	The site forms a longstanding allocation and has been partly delivered.
	GA3/h58	Adj. Lletty Mawr, Tumble	6	The site is completed
	GA3/MU1	Cross Hands West,	220	Initial phase of the residential development completed. Progress to date provides a strong indication in terms of the delivery of the remainder of the residential element of the allocation.
	GA3/MU2	Emlyn Brickworks Site	250	<p>The site has been the subject of a longstanding allocation over a number of Development Plans.</p> <p>Currently 9 dwellings have been permitted on part of the site and an application for a further 70 dwellings is pending determination. The site is a significant regeneration opportunity with its ongoing allocation for mixed use largely linked to the delivery of the next phase of the Cross hands link road which would facilitate the site's release.</p> <p>However, whilst the current and proposed development on the site is recognised the delivery of the remainder of the site requires further evidence outlining the mix of uses and the scale of any development. It should also address key considerations relating to delivery</p>

Settlement	Map Ref	Site Name	Total Allocation	Status
				issues. A masterplan for the site would be beneficial to address these matters.
		<b>Total</b>	<b>2552</b>	
<b>Pembrey/Burry Port</b>				
	T2/1/h1	Lando Road, Pembrey	66	Longstanding allocation - an initial phase of units have long since been completed. There is no indication of any further application for the remainder of the site.
	T2/1/h2	Cwrt Farm, Pembrey	75	There is a longstanding pending planning application on this longstanding undeveloped housing allocation. It is understood that access arrangements are being reviewed at present.
	T2/1/h3	Oaklands Close, Bury Port	8	The site is completed
	T2/1/h4	Bay View, Graig, Burry Port	9	Longstanding allocation - This site has a protracted planning history. It is understood that there is planning permission in perpetuity, however there is limited evidence of delivery / commencement.
	T2/1/h5	Cwrt Gwscwm, Burry Port	9	The site is completed
	T2/1/h6	Site of former St Mary's Church Parish Hall, Stepney Road, Burry Port	13	The site is completed
	T2/1/h7	Dolau Fan, Burry Port	7	Substantively completed - any units / capacity remaining will be considered for the revised LDP.
	T2/1/h8	Chandler's Yard, Burry Port Harbour	40	The site is completed
	T2/1/h9	Gwdig Farm, Burry Port	86	Longstanding undeveloped allocation. It is understood that there is interest in the site however no pre application consultation and/or planning application has been formulated.
	T2/1/h10	Lando Road, Pembrey	20	The site was allocated during the adoption of the LDP. There is no indication that the site is to be brought forward.
	T2/1/h11	Garreglwyd, Pembrey	10	The site was allocated during the adoption of the LDP. A Pre-Application Consultation has been undertaken on the site. The site is within the County Council's Phase 1 New Build Programme.

Settlement	Map Ref	Site Name	Total Allocation	Status
	T2/1/h12	Dyfatty North, Burry Port	40	The site was allocated during the adoption of the LDP. There are indications that the landowner is showing intent to sell / develop.
	T2/1/h13	Dyfatty South, Burry Port	20	The site was allocated during the adoption of the LDP. There are indications that the landowner is showing intent to sell / develop.
	T2/1/h14	Heol Waun Wen, Burry Port	10	The site was allocated during the adoption of the LDP. The landowner has expressed an intent to sell / develop.
		<b>Total</b>	<b>413</b>	
<b>Llandeilo</b>				
	T2/2/h1	Llandeilo Northern Quarter	215	Longstanding allocation - no planning permissions, however the whole site benefits from a Planning & Development Brief and parts of the site are being actively marketed which should instigate a phased start to development of the site.
	T2/2/h2	Land opp. Pantglas	6	The site was allocated during the adoption of the LDP. There is no indication that the site is to be brought forward.
	T2/2/h3	Land north of Pantglas	6	The site was allocated during the adoption of the LDP. An outline planning application has recently been submitted on this site.
	T2/2/h4	Thomas Terrace	5	The site was allocated during the adoption of the LDP. Lapsed outline permission. There is no indication that the site is to be brought forward.
	T2/2/h5	Caeglas, Ffairfach	25	Longstanding allocation - An application for 26 dwellings (E/21673) was withdrawn in November 2009. There has been no recent interest and subsequently no indication that the site is to be brought forward.
	T2/2/h6	The Old Tannery	6	The site was allocated during the adoption of the LDP - the site is located within a C2 flood risk area. The applicant has submitted a FCA as part of an application which is currently being considered.
		<b>Total</b>	<b>263</b>	
<b>Llandovery</b>				

Settlement	Map Ref	Site Name	Total Allocation	Status
	T2/3/h1	Land to north of Dan y Crug	60	Longstanding allocation - the site has planning permission for residential development but has not shown sufficient progress towards delivery.
	T2/3/h2	New Road, Llandovery	6	The site was allocated during the adoption of the LDP - Pending planning permission, awaiting S106, however the Landowner has indicated that they do not presently intend to develop
	T2/3/MU1	Site of Ysgol Pantycelyn	45	The site was allocated during the adoption of the LDP. The site is subject to proposals for the relocation of the current Rhys Pritchard County Primary School as part the sites re-development.
		<b>Total</b>	<b>111</b>	
<b>Newcastle Emlyn</b>				
	T2/4/h1	Whitegates	17	A long standing allocation. There is a pending application on the site, which has not yet been determined.
	T2/4/h2	Land rear of Ty Llwyd	12	The site is under construction.
	T2/4/h3	Pt OS 1100 Penlon	14	A long standing allocation with no recent history of any planning permissions.
	T2/4/h4	Land to r/o Dolcoed	34	The site was allocated during the adoption of the LDP, no progress has been made to develop the site since its allocation.
	T2/4/h5	Millbank	12	The site was allocated during the adoption of the LDP, no progress has been made to develop the site since its allocation.
		<b>Total</b>	<b>89</b>	
<b>St Clears</b>				
	T2/5/h1	Adjacent to Pwll Trap Road	48	The site has been completed
	T2/5/h2	Clare Hill, Pwll Trap	5	The site has been completed
	T2/5/h3	Adjacent to Lower Ostrey	60	The site has been completed
	T2/5/h4	Adjacent to Britannia Terrace	50	This is a long standing housing allocation with no planning permission. However the developer has been in discussion with the adjacent landowner relating to the site's delivery.

Settlement	Map Ref	Site Name	Total Allocation	Status
	T2/5/h5	Adjacent to Brynheulog	40	This is a long standing housing allocation with no planning permission, however there have been pre-application discussions.
	T2/5/h6	Adjacent to Gardde Fields	8	This is a long standing housing allocation with no planning permission. Only one unit has been developed since the adoption of the UDP in 2006.
	T2/5/h7	Station Road	20	The site has been completed
	T2/5/h8	Glasfryn School	48	Only four dwellings remain to be built. The site is nearing completion.
		<b>Total</b>	<b>279</b>	
<b>Whitland</b>				
	T2/6/h1	Lon Hywel	32	This is a long standing housing allocation with no planning permission. An outline permission has recently expired.
	T2/6/h2	King's Court, North Road	24	The site is nearing completion, with only one unit remaining.
	T2/6/h3	Land adjacent to Maes Abaty	72	This is a long standing housing allocation with no planning permission.
	T2/6/h4	Adj. Spring Gardens	64	This is a long standing housing allocation, although the majority of the site has full planning permission.
	T2/6/h5	Land adj. Aelybryn	7	The site is nearing completion.
	T2/6/h6	Old Ivydene site	6	The site is nearing completion.
<b>Laugharne</b>		<b>Total</b>	<b>205</b>	
	T3/1/h1	Pludds Meadow	40	This is a long standing housing allocation, however, the site has planning permission.
	T3/1/h2	Land adjacent to Laugharne School	42	This is a new allocation in the LDP. An application has been submitted on the site, which is pending a decision.
		<b>Total</b>	<b>82</b>	
<b>Ferryside</b>				
	T3/2/h1	Rear of Nythfa	20	The site has been completed
	T3/2/h2	Adjacent to Roberts Rest	12	Two of the houses are under construction. The site is being delivered on a plot by plot basis.
		<b>Total</b>	<b>32</b>	
<b>Kidwelly</b>				
	T3/3/h1	Clos Yr Afon	6	The site has been completed
	T3/3/h2	Rhodfa'r Gwendraeth	27	The site is nearing completion.

Settlement	Map Ref	Site Name	Total Allocation	Status
	T3/3/h3	Land adjacent to Stockwell Lane	95	The site is a long standing housing allocation and there has been no indication of delivery.
	T3/3/h4	Land between Parc Pendre and Stockwell Forge	58	This is a long standing housing allocation. The site has a pending renewal of the outline permission.
	T3/3/h5	Land adjacent to Broawel	10	This is a long standing housing allocation. The site has an outline permission with a pending application to extend the time of the outline and to submit Reserved Matters
	T3/3/h6	Former Butter Factory & Coal Yard, Station Road	36	The site is nearing completion.
	T3/3/h7	Land to the rear of Park View Drive, Station Rd.	12	This is a new allocation in the LDP. Outline planning permission has been granted.
	T3/3/h8	Land at Morfa Maen	7	The site has been completed
	T3/3/h9	Former Dinas Yard Factory	20	This is a new allocation in the LDP. The site has a pending outline application. The site is tied to T3/3/h10
	T3/3/h10	Land adjacent Former Dinas Yard Factory	30	This is a new allocation in the LDP. The site has a pending outline application. The site is tied to T3/3/h9.
		<b>Total</b>	<b>301</b>	
<b>Trimsaran</b>	T3/4/h1	Adj. Filling Station, Bryncaerau	7	This is a long standing housing allocation. The site does not have planning permission.
	T3/4/h2	Land to the rear of No 7-9a, Bryncaerau	11	This is a new allocation in the LDP. The site has a pending outline application, however it is not being progressed.
	T3/4/h3	No. 20 Bryncaerau	6	This is a new allocation in the LDP. The site has a pending outline application.
	T3/4/h4	Pt Enc 754 Heol Waun y Clun	20	This is a long standing housing allocation. The planning permission has been implemented, however the progress of the development has been limited to the access only.
<b>Chat to Gary on it. New LDP policies.</b>	T3/4/h5	Land north of Maesffynnon	35	This is a long standing housing allocation. There is currently an application pending to extend the time period.
	T3/4/h6	Adjacent to Primary School	62	This is a long standing housing allocation. The site has implemented the planning permission on the frontage. No progress has been made on the remainder of the site.

Settlement	Map Ref	Site Name	Total Allocation	Status
	T3/4/h7	Land at Gwelfor, Heol Llanelli	23	This is a long standing housing allocation. The site does not have planning permission.
		<b>Total</b>	<b>164</b>	
<b>Meinciau</b>	T3/5/h1	Adj. Black Horse	30	This is a long standing housing allocation. The site has full permission with a technical start made on the site, however no progress is being made.
<b>Pontyates</b>	T3/5/h2	South of Parc Mansant	12	The site is a long standing housing allocation, and no applications have been submitted.
	T3/5/h3	Adj. Clos y Dderwen	20	The site is nearing completion.
	T3/5/h4	Adj. 1 Heol Glyndwr	8	This is a new allocation in the LDP. No planning applications have been received on the site. Correspondence has been received from the land owner stating that they have no intentions at present for the site and will be looking to keep the site for the future.
	T3/5/h5	Land at Heol Glan-Gwendraeth	8	This is a new allocation in the LDP. No correspondence has been received relating to the site.
	T3/5/h6	Cae Pontbren	16	The site is a long standing housing allocation. The site has no planning permission. Correspondence has been received from the owner stating their intention to submit an application on the site.
	T3/5/h7	Cae Canfas, Heol Llanelli	8	This is a new allocation in the LDP. The site does not have planning permission.
	T3/5/h8	Land at Heol Llanelli / Danybanc Road	100	The site is a long standing housing allocation. The site has no planning permission.
<b>Ponthenri</b>	T3/5/h9	Land at Ty'n y Waun Farm	30	This is a new allocation in the LDP. The site has an outline planning permission on the road frontage. No correspondence has been received relating to the rear of the site.
	T3/5/h10	Incline Inn	7	This is a new allocation in the LDP. The site does not have planning permission.
		<b>Total</b>	<b>239</b>	
<b>Pontyberem / Bancffosfelen</b>	T3/6/h1	Bryngwyddil, Bancffosfelen	13	The site has been completed.

Settlement	Map Ref	Site Name	Total Allocation	Status
	T3/6/h2	Land Adj. Llwynpiod, Bancffosfelen	40	The site was a new allocation at the adoption of the LDP. No correspondence has been received relating to this site.
	T3/6/h3	Land Adj. 39 Heol y Felin, Pontyberem	6	The site was a new allocation at the adoption of the LDP. The site has an expired reserved matters permission. No correspondence has been received on the site.
	T3/6/h4	North & NW of Heol Aneddfa, Pontyberem	20	The site was a new allocation at the adoption of the LDP. The owner has indicated that the site will be marketed for sale, however no application / pre application discussion has been made.
	T3/6/h5	Land off Ashgrove, Pontyberem	6	The site was a new allocation at the adoption of the LDP. The owners have been in discussions with developers regarding the development of the site. No application / pre-application correspondence has been received by the Local Authority.
	T3/6/h6	Land Off Heol Llannon, Pontyberem	55	The site was a new allocation at the adoption of the LDP. An application enquiry has been made for small scale development, however no application / pre-application correspondence has been received by the Local Authority.
		<b>Total</b>	<b>140</b>	
<b>Hendy</b>	T3/7/h1	Clos Y Wern, Hendy	35	The site has been completed
	T3/7/h2	Adj Clos Y Wern, Hendy	5	The site was a new allocation at the adoption of the LDP. It is understood that there has been informal interest but this has not led to a planning application.
	T3/7/h3	Land adj. Clos Ty Gwyn, Hendy	66	Planning permission in place and site being delivered. The site was a new allocation.
	T3/7/h4	Land between Clayton Road and East of Bronallt Road	20	The site was a new allocation at the adoption of the LDP. It is understood that there are ongoing exploratory discussions with a view to formulating an integrated scheme with site T3/7/h5 below.
	T3/7/h5	Land to East of Bronallt Road	28	The site is a longstanding allocation. Planning permission for 8 units pending s106. It is



Settlement	Map Ref	Site Name	Total Allocation	Status
				understood that there are ongoing exploratory discussions with a view to formulating an integrated scheme with site T3/7/h4 above (circa 40 units).
	T3/7/h6	Coed y Bronallt	7	The site is a longstanding allocation with deliverability established, with potential for further units to be built on vacant plots and /or white land.
	T3/7/h7	Land at Fforest Garage	17	The site was a new allocation at the adoption of the LDP. It is understood that alternative uses remain active on site.
	T3/7/h8	Land adjacent to Clos Benallt Fawr, Fforest	35	The site was a new allocation at the adoption of the LDP. A Pre-Application Consultation has been completed.
	T3/7/h9	Llanedi Road, Fforest	6	The site is a longstanding allocation with planning permission. Two units are complete/under construction.
		<b>Total</b>	<b>219</b>	
<b>Glanamman / Garnant</b>	T3/8/h1	Land off Llwynceilyn Road	28	The site is a longstanding allocation. Previous outline permission has lapsed. There has been no recent interest and subsequently no indication that the site as a whole is to be brought forward.
	T3/8/h2	Land at Maes Llewellyn	12	The site is completed
	T3/8/h3	Adj. Parc Bryn Rhos	70	The site is a longstanding allocation. A previous reserved matters permission has expired. The Landowner has indicated his intention to develop the site, however at the present time there has been insufficient evidence to show the site will be delivered.
	T3/8/h4	Land at Glan yr Afon	35	The site forms a longstanding allocation, but has not been developed and there has been insufficient evidence to show that the site will be delivered.
	T3/8/h5	Glyn Dreinog Market Garden	13	The site is a longstanding allocation. A previous outline permission has expired. The Landowner has indicated an intention to develop the site, however at the present time

Settlement	Map Ref	Site Name	Total Allocation	Status
				there has been insufficient evidence to show that the site will be delivered.
	T3/8/h6	Garnant CP School, New School Road	9	The site has planning permission and building works are underway.
	T3/8/h7	Site adj. 1 Arcade Terrace	8	The site is completed
	T3/8/h8	Land adj. No 13 Bishop Road	8	The site was allocated during the adoption of the LDP. Full planning permission for the site has expired.
	T3/8/h9	Land off Bishop Road	22	The site was allocated during the adoption of the LDP. History of various planning permissions. There has been a recent pre-application enquiry.
	T3/8/h10	Raven Garage, Cwmamman Road	5	The site was allocated during the adoption of the LDP. It is understood that alternative uses remain active on site.
	T3/8/h11	Land to r/o Day Centre, corner of Cwmamman Road & Folland Road	5	The site was allocated during the adoption of the LDP. There is no indication that the site is to be brought forward.
	T3/8/h12	Cowell Road	5	Expired planning. Landowner has indicated an intention to develop on an individual plot basis.
	T3/8/h13	Enc 1822 Nantgwineu Road	8	The site is completed.
	T3/8/h14	Former Glanamman Primary School	19	The site was allocated during the adoption of the LDP. The site has full Planning Permission and is under construction.
		<b>Total</b>	<b>247</b>	
<b>Brynamman</b>	T3/9/h1	Land adj. 53 Station Road	22	The site was allocated during the adoption of the LDP. No recent planning interest on the site. There is no indication that the site is to be brought forward.
	T3/9/h2	Land at Ardwyn Road	8	The site was allocated during the adoption of the LDP. The site has planning permission and two houses have already been completed. The landowner has indicated an intention to build further units and sell on a plot by plot basis.
	T3/9/h3	Mountain Road	5	The site forms a longstanding residential allocation on which two dwellings have been

Settlement	Map Ref	Site Name	Total Allocation	Status
				built. There is no recent interest on the remainder of the site.
	T3/9/h4	Land south of Cwmgarw Road	65	Much of the site forms part of a longstanding allocation. There is no indication that the site is to be brought forward.
	T3/9/h5	Land to r/o No 111-115 Cwmgarw Road	7	The site was allocated during the adoption of the LDP. There is a current Full Application in for 9 dwellings on this allocation.
		<b>Total</b>	<b>107</b>	
<b>Llangadog</b>	T3/10/h1	Land opp. Llangadog C.P School	27	A long standing allocation (development brief). Part of site will be a car park associated with the County Primary School opposite. There will be an access through from the car park to the housing allocation beyond. It is noted the site is split between 2 ownerships.
	T3/10/h2	The Old Mart site	10	The site is completed
		<b>Total</b>	<b>37</b>	
<b>Llanybydder</b>	T3/11/h1	Adj. Y Neuadd	10	A long standing allocation with no recent history of any planning permissions.
	T3/11/h2	Adj. y Bryn	10	A long standing allocation with no recent history of any planning permissions.
	T3/11/h3	Lakefield	39	A long standing allocation with no recent history of any planning permissions.
	T3/11/h4	R/O Deri, Heol y Deri	16	The site is completed.
	T3/11/h5	Troedybryn	23	A long standing allocation with no recent history of any planning permissions.
		<b>Total</b>	<b>98</b>	
Drefach/ Felindre	SC1/h1	Parc Puw	40	Part of the site has been developed. Development of the remaining land is currently being discussed with Officers.
	SC1/h2	Land Adj. Aweldeg	30	The site was allocated during the adoption of the LDP. No recent history of any planning permissions.
Waungilwen	SC1/h3	Land at Waungilwen Road	5	Planning permission exists for 1 unit on the site, the remainder does not have any recent history of permissions.

Settlement	Map Ref	Site Name	Total Allocation	Status
	SC1/h4	Opposite Springfield	6	Longstanding allocation. An application has been submitted for the site and is currently awaiting determination.
	SC1/h5	Land at Arwel	7	Longstanding allocation. An application has been submitted for the site and is currently awaiting determination.
		<b>Total</b>	<b>88</b>	
Llangeler	SC2/h1	Brogeler	6	Planning permission has been granted for the site.
Pentrecwrt	SC2/h2	Land adjoining Brynwawr	14	The site was allocated during the adoption of the LDP. No recent history of any planning permissions.
Saron	SC2/h3	Land adjacent to Tyddyn y Celyn	8	Part of a longstanding allocation. A planning application has been submitted for the site, but has not yet been determined.
	SC2/h4	Land adj. Arwynfa	35	The site was allocated during the adoption of the LDP. Whilst no permission currently exists on the site, it is the landowners intention to shortly progress with development on the site.
		<b>Total</b>	<b>63</b>	
Llanboidy	SC3/h1	Land r/o Ysgol Bro Brynach	20	The site is a new allocation in the LDP. The site does not have planning permission.
		<b>Total</b>	<b>20</b>	
Glandy Cross	SC4/h1	Land to r/o Maesglas	10	The site is a long standing allocation. The site does not have planning permission. The landowner has indicated an application is going to be submitted.
	SC4/h2	Land at Cross Roads	6	The site is nearing completion.
Efailwen	SC4/h3	Beca Bakery	9	The site is nearing completion.
		<b>Total</b>	<b>25</b>	
Capel Iwan	SC7/h1	Adj. Pleasant View	7	A long standing allocation with no recent history of any planning permissions.
	SC7/h2	Maes y Bryn	13	The site was allocated during the adoption of the LDP. Whilst no permission currently exists on the site, it is the landowners stated intention

Settlement	Map Ref	Site Name	Total Allocation	Status
				to shortly progress with development on the site.
		<b>Total</b>	<b>20</b>	
Trelech	SC8/h1	Adj. Picton House	6	The sewerage work has been upgraded which has meant to that the site is available for development. The landowner is looking to develop the site.
	SC8/h2	Land adj Tower Hill	5	The site is partly developed.
		<b>Total</b>	<b>11</b>	
Cynwyl Elfed	SC9/h1	Adj. Fron Heulog	8	Longstanding allocation. Permission has been granted for road and plot layout and the road and access has been constructed. The site is currently for sale.
	SC9/h2	Land adj. Lleine	15	Longstanding allocation. Full planning permission exists on the site and the landowner advises that work is due to commence soon. 1 unit has been completed.
	SC9/h3	Adj. Dolwerdd	6	A long standing allocation with no recent history of any planning permissions.
		<b>Total</b>	<b>29</b>	
Llangynin	SC11/h1	O.S 8671, r/o Lrfonan	10	The site has partly been developed.
Meidrim	SC11/h2	Land off Drefach Road	12	The site has been a long standing allocation. The site is subject to various permissions however its delivery has been stagnant.
	SC11/h3	Land adjacent and to the r/o Lon Dewi	10	The site was a new allocation within the LDP. No applications have been submitted relating to its development.
		<b>Total</b>	<b>32</b>	
Pendine	SC13/h1	Land at Nieuport Yard	5	The site was a new allocation within the LDP. The site does not have planning permission, however the landowner has stated their intention to develop the site.
	SC13/h2	Ocean's View	5	This is a long standing allocation. The site is to be developed on a plot by plot basis.

Settlement	Map Ref	Site Name	Total Allocation	Status
Llanmiloe	SC13/h3	Land at Woodend	40	The site was a new housing allocation within the LDP and is subject to current planning permissions.
		<b>Total</b>	<b>50</b>	
Red Roses	SC14/h1	Land adj. Avola Farm	8	The site is a longstanding housing allocation and no applications or enquires have been submitted relating to its development
		<b>Total</b>	<b>8</b>	
Bancyfelin	SC15/h1	R/O Fox and Hound P.H	23	The site is a longstanding housing allocation has full planning permission. The developer is in the process of discharging pre-commencement conditions.
Llangynog	SC15/h2	Land at College Bach	5	The site is a new allocation within the LDP. No applications or enquires have been submitted relating to its development.
		<b>Total</b>	<b>28</b>	
Llanybri	SC16/h1	Adj. Parc y Delyn	10	The site is a longstanding housing allocation and no applications or enquires have been submitted relating to its development.
		<b>Total</b>	<b>10</b>	
Mynyddygarreg	SC17/h1	Parc y Garreg	74	The site has been completed
	SC17/h2	Parc Felindre	11	The site has been completed
	SC17/h3	Adj. The Croft	28	The site has been completed
	SC17/h4	Land opposite Parc y Garreg	30	The site is a new LDP allocation. The site has an outline planning permission.
		<b>Total</b>	<b>143</b>	
Bronwydd/ Cwmdwyfran	SC18/h1	Land to rear of Swyn Aderyn, Bronwydd	15	The site is a long standing allocation. A planning application is pending.
Cwmffrwd	SC18/h2	Cwmffrwd Nurseries	10	The site has been completed.
	SC18/h3	Land adj. to Maes Glasnant	30	The site has a valid outline planning permission, with the reserved matters details being submitted on a plot by plot basis.
	SC18/h4	Adj. to Ffrwdwen	23	The site is a longstanding housing allocation and no applications or enquires have been submitted relating to its development

Settlement	Map Ref	Site Name	Total Allocation	Status
Llangain	SC18/h5	South of Dol y Dderwen	25	The site is a new LDP allocation. The site does not have planning permission, however pre-application discussions have been commenced.
Peniel	SC18/h6	South of Pentre	10	The site is a new LDP allocation. The site does not have planning permission, however the landowner has advised of their intention to submit an application on the site.
	SC18/h7	Adj. Aberdauddwr	10	The site has been completed
		<b>Total</b>	<b>123</b>	
Alltwalis	SC19/h1	Former Hall	8	The site has been completed.
Llanpumsaint	SC19/h2	Adj. to Llandre	9	Much of the site has been built out, the remaining 4 plots are subject to a planning application which has been submitted but not yet determined.
	SC19/h3	Adj. Gwyn Villa	20	A long standing allocation with no recent history of any planning permissions.
Rhydargaeau	SC19/h4	Bryn Bedw	11	A long standing allocation with no recent history of any planning permissions. The applicant has however stated an intention to submit an application on the site shortly.
	SC19/h5	Cefn Farm	18	Site is under construction.
		<b>Total</b>	<b>66</b>	
Llanfihangel-ar-arth	SC20/h1	Adj. Yr Hendre	8	A long standing allocation with no recent history of any planning permissions.
New Inn	SC20/h2	Adj. Nant y Gelli	8	One dwelling has been completed, further application submitted.
	SC20/h3	Blossom Inn	12	Two dwellings have been completed on the site, permission has expired on the remaining site. The landowner is progressing with an application on the remainder of the site.
Pencader	SC20/h4	Bro'r Hen Wr	17	Long standing allocation. Seven units remain on the site. An application to extend the time of an outline permission has not yet been determined.
	SC20/h5	North of Maes Cader	37	The site was allocated during the adoption of the LDP but with no recent history of any planning permissions.

Settlement	Map Ref	Site Name	Total Allocation	Status
	SC20/h6	Adj. Tremle House	9	The site is nearing completion, two units remain and both are under construction.
		<b>Total</b>	<b>91</b>	
Pontwelly	SC21/h1	Cilgwyn Bach	17	Longstanding allocation. Outline planning permission has been granted on the site.
	SC21/h2	Adj. Crug yr Wyn	19	Longstanding allocation. Outline planning permission has been granted on the site.
		<b>Total</b>	<b>36</b>	
Llanllwni	SC22/h1	Land at Aber-Giar	10	The site was allocated during the adoption of the LDP. Permission has been granted for 4 plots on part of the site which are currently being constructed. No permission exists for the remaining land.
	SC22/h2	Land adj Ger y Bryn	8	The site was allocated during the adoption of the LDP but with no recent history of any planning permissions. The landowner has said that they intend keeping the site for future development.
	SC22/h3	Adj. Tan y Bryn	11	The site was allocated during the adoption of the LDP but with no recent history of any planning permissions. The landowner has said that they intend keeping the site for future development.
		<b>Total</b>	<b>29</b>	
Cwmann	SC23/h1	Cysgod y Coed	7	Three units remain on the site, one of which is under construction.
	SC23/h2	Heol Hathren	12	A long standing allocation with no recent history of any planning permissions.
	SC23/h3	Cwrt Deri	29	The site is under construction.
	SC23/h4	Cae Coedmore	7	3 houses remain on the site as part of an extant permission.
	SC23/h5	R/O Post Office	18	A long standing allocation, with an outline application submitted, but not yet determined.
		<b>Total</b>	<b>73</b>	
Caeo	SC24/h1	Land west of Rock Street	8	The site was allocated during the adoption of the LDP. No planning permission. Recent



Settlement	Map Ref	Site Name	Total Allocation	Status
				change of ownership - the new owner has indicated an intention to develop.
Ffarmers	SC24/h2	Land adj. Tegeirian	8	The site was allocated during the adoption of the LDP. Permission for one unit which takes up about half of the allocation area. The landowner has indicated his intention that he would be willing to sell the remainder of the site for potential housing development.
		<b>Total</b>	<b>16</b>	
Llansawel	SC25/h1	Land adj. Dolau Llan	5	The site was allocated during the adoption of the LDP. There is no indication that the site is to be brought forward.
Rhydcymerau	SC25/h2	Land at Dolau Isaf	6	The site was allocated during the adoption of the LDP. The site has outline permission.
Talley	SC25/h3	Land adjoining Ffynnon Dawel	8	The site forms a longstanding housing allocation. The site has various permissions.
	SC25/h4	Land at Edwinsford Arms	9	The site was allocated during the adoption of the LDP. A current pre-application has been submitted.
	SC25/h5	Land adjoining Dyffryn Glas	8	The site forms a longstanding allocation, but has not been developed and there has been insufficient evidence to show that the site will be delivered.
		<b>Total</b>	<b>36</b>	
Llanwrda	SC26/h1	Caegof, Lampeter Road	8	The site is completed.
		<b>Total</b>	<b>8</b>	
Cynghordy	SC28/h1	Adj. Bronhaul	22	Longstanding allocation with no development. An application to develop the site is still pending.
		<b>Total</b>	<b>22</b>	
Cwmifor	SC30/h1	Opp. Village Hall	25	Part of the site forms a longstanding housing allocation; this was increased in size during the adoption of the LDP. Outline permission expires in January 2018; no reserved matters have been submitted to date.
Penybanc	SC30/h2	Caebach, Penybanc	5	Part of the site is completed and the remainder is under construction.

Settlement	Map Ref	Site Name	Total Allocation	Status
Salem	SC30/h3	Adj. Golwg y Gar	5	The site was allocated for housing during the adoption of the LDP. There is a reserved matters in place for part of the site.
		<b>Total</b>	<b>35</b>	
Cwrt Henri	SC31/h1	OS 5227 at Pantyffynnon,	16	The site was allocated during the adoption of the LDP. An application is currently under consideration.
Llanarthne	SC31/h2	Llanarthne School	8	The site is a new LDP housing allocation. The site has been subject to recent planning applications, and is being sold on a plot by plot basis.
	SC31/h3	Adj. Golwg y Twr	10	The site is a long standing allocation, however there has been no indication that the site is going to be developed.
		<b>Total</b>	<b>34</b>	
Capel Dewi	SC32/h1	Llwynddewi Road	8	The site is a long standing housing allocation. The landowner has stated that they will progress with discussions, however this has not been forthcoming.
Nantgaredig	SC32/h2	Rear of former joinery, Station Road	30	The site was a new allocation within the LDP. No planning permission, however the landowner has indicated a commitment to develop the site.
Pontargothi	SC32/h3	Land adj. Cresselly Arms	15	The site is a long standing housing allocation. A small part of the site has been completed and the remainder has outline permission.
		<b>Total</b>	<b>53</b>	
Llanddarog	SC33/h1	Land opp. Village Hall	16	The site is a long standing housing allocation. The site has been granted outline planning permission.
	SC33/h2	Is Y Llan	6	The site is a long standing housing allocation. The landowner has stated that the site is for sale, however no applications have been submitted.
Porthyrhyd	SC33/h3	R/O Ysgoldy Bethlehem	27	The site was a new allocation within the LDP. However, no applications or pre-application discussions have taken place regarding its development.
	SC33/h4	Adj. Derwen Deg	9	The site is nearing completion.

Settlement	Map Ref	Site Name	Total Allocation	Status
		<b>Total</b>	<b>58</b>	
Carmel	SC34/h1	Land adjacent to Erwlas and Erwlon	10	The site is a long standing housing allocation, with no planning history and there has been no indication that the site is going to be developed.
Cwmgwili	SC34/h2	Part of Heathfield Industrial Park	15	The site has been completed.
	SC34/h3	Adj. Coed y Cadno Estate, Lotwen Road	10	The site is a long standing housing allocation. The site has been granted full planning permission and has subsequently been granted an application for discharge of conditions.
Foelgastell	SC34/h4	Adjacent to Meadow's Edge	55	The site is a long standing allocation. The site has been split into three separate developments and has been the subject of a number of planning permissions.
Llannon	SC34/h5	Land north of Clos Rebecca	38	The site is a new housing allocation in the LDP. A statutory Pre-app has been submitted on the site with a view to publishing a pre-application consultation.
Maesybont	SC34/h6	Land adjacent to Maesybryn	6	The site is a long standing housing allocation, with no planning history and there has been no indication that the site is going to be developed.
Milo	SC34/h7	Land adj. Nant yr Allt	5	The site is nearing completion.
		<b>Total</b>	<b>139</b>	
Ystradowen	SC35/h1	Former Ystradowen Primary School	9	The site is a new LDP housing allocation. Planning permission for two dwellings takes up the whole site.
	SC35/h2	Adj. y Goedlan	11	The site forms a longstanding allocation, but has not been developed and there has been insufficient evidence to show that the site will be delivered.
	SC35/h3	Land off Pant y Brwyn	5	The site was a new allocation in the LDP. The site has an outline permission.
	SC35/h4	Land at New Road	9	The site forms a longstanding allocation, but has not been developed and there has been

Settlement	Map Ref	Site Name	Total Allocation	Status
				insufficient evidence to show that the site will be delivered.
		<b>Total</b>	<b>34</b>	
Llanedi	SC36/h1	Land to r/o No 16 Y Garreg Llwyd	7	The site was a new allocation at the adoption of the LDP. It is understood that there is interest in developing the site and initial discussions have been undertaken.
		<b>Total</b>	<b>7</b>	
Five Roads	SC37/h1	Clos Y Parc	34	The site forms a longstanding allocation, however there is evidence of deliverability with the site being developed and further planning permissions issued
	SC37/h2	Llygad y Ffynnon	14	The site has been completed.
	SC37/h3	Land adj. Little Croft	25	The site was a new allocation at the adoption of the LDP. The landowner has expressed an intent to develop the site, however no applications have been submitted.
		<b>Total</b>	<b>73</b>	
Llangyndeyrn	SC39/h1	Adj. Maes y Berllan	12	The site is a long standing housing allocation, and the owner has indicated no intention to develop the site.
		<b>Total</b>	<b>12</b>	
Carway	SC40/h1	Carway Farm	8	The site formed part of a long standing housing allocation, and the site has no planning permission.
	SC40/h2	Brynseilo	5	The site is nearing completion.
	SC40/h3	Ffos Las	480	The site is a new LDP housing allocation. The majority of the site is being developed.
		<b>Total</b>	<b>493</b>	
Llanfynydd	SC41/h1	Adj. Valley View	14	The site forms a longstanding allocation, whilst there are various permissions including outline and reserved matters the site remains undelivered.
		<b>Total</b>	<b>14</b>	

Settlement	Map Ref	Site Name	Total Allocation	Status
Brechfa	SC42/h1	Adj. Maesygroes	14	The site forms a longstanding allocation, but has not been developed. There has been insufficient evidence to show that the site will be delivered.
		<b>Total</b>	<b>14</b>	

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## EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

### REVISED CARMARTHENSHIRE LOCAL DEVELOPMENT PLAN 2018 - 2033 DRAFT DELIVERY AGREEMENT AND DRAFT SITE ASSESSMENT METHODOLOGY

#### Recommendations / key decisions required:

- To approve the Draft Delivery Agreement for the Revised Carmarthenshire Local Development Plan for a 6 week formal consultation.
- To approve the commencement of the initial stages of the LDP preparatory process in advance of any agreement on the final Delivery Agreement.
- To approve the content of the Draft Site Assessment Methodology.
- Grant officers delegated authority to continue preparatory discussions and to make typographical or factual amendments as necessary to improve the clarity and accuracy of the Draft Delivery Agreement and to refine the usability of the Draft Site Assessment Methodology.

#### Reasons:

- To comply with the Council's statutory obligations in terms of the preparation and progress of the preparation of a revised Local Development Plan for Carmarthenshire in accordance with statutory procedures.
- To ensure the adoption of a revised (replacement) LDP in a timely manner ahead of the expiration of the current LDP.

Relevant scrutiny committee to be consulted Community Scrutiny Committee:  
Scheduled 14<sup>th</sup> December 2017

Exec Board Decision Required YES

Council Decision Required YES

#### EXECUTIVE BOARD MEMBER PORTFOLIO HOLDER:- Cllr Mair Stephens

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# EXECUTIVE SUMMARY

## EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

### REVISED CARMARTHENSHIRE LOCAL DEVELOPMENT PLAN 2018 – 2033

#### DRAFT DELIVERY AGREEMENT AND DRAFT SITE ASSESSMENT METHODOLOGY

##### 1. BRIEF SUMMARY OF PURPOSE OF REPORT.

The purpose of the report is to seek approval of the Draft Delivery Agreement for the preparation of the Revised Carmarthenshire Local Development Plan (2018 – 2033). The Council at its meeting on the 20<sup>th</sup> September 2017 resolved to prepare the Review Report into the LDP. This Review Report is being presented concurrent with this report for consideration through the Council's reporting structure. Subject to the deliberations in respect of the Review Report, work will commence on the preparation of the Revised LDP which will on its adoption replace the current adopted Plan.

The first step in preparing the revised LDP is the preparation of a Delivery Agreement (DA). The DA comprises a timetable of the key stages for preparing the revised LDP and a community involvement scheme (CIS), which sets out how and when stakeholders and the community can engage and contribute during the Plan's preparatory process.

The timetable set out within the DA identifies a challenging, but realistic, timeframe for preparing the replacement LDP. From the start of the process in January 2018, it is anticipated that the revised LDP will be adopted by September 2021. This challenging timetable for adoption reflects the Welsh Government's general expectation that LDPs be prepared and adopted within 4 years, but also critically ensures that the Revised Plan is in place ahead of the expiration of the current adopted Plan at the end of 2021.

The CIS sets out the Council's participation strategy; the role of the Local Planning Authority, Councillors and Officers; the methods of engagement and the bodies, agencies and organisations to be involved; and the Council's expectations of all stakeholders and participants who become involved in the process and what they can expect of the Council.

This DA will be subject to consultation prior to it being sent formally to the Welsh Government for agreement. Once agreed the DA commits the Council to producing the replacement LDP to the stated timescales and through the identified consultation processes. The DA forms part of the statutory process in relation to producing an LDP and is therefore a requirement of the legislation.



A further component of this report relates to the preparation and publication of the Site Assessment Methodology. The draft methodology attached to this report seeks to develop a robust and consistent framework for the consideration of sites submitted during the preparation of the Revised LDP. Central to the approach is the need for all sites proposed to be supported by sufficient information to allow for their effective consideration, and to ensure they are deliverable.

## 2. Introduction and Background

In considering the progress towards the preparation of the Revised LDP, this report should be read following on from that presented to this meeting in relation to the Carmarthenshire LDP Review Report. In this respect, this report and the content of the DA and Site Assessment Methodology are presented in the interests of expediency and to ensure the timely production of the Revised LDP.

Following consideration of the second Annual Monitoring Report (AMR) at the meeting of County Council on the 20<sup>th</sup> September 2017, it was resolved that a Review Report in respect of the Carmarthenshire LDP be prepared. This will culminate with the production of the final Review Report, which will set out the extent of changes required to the LDP and the recommendation to proceed with the preparation of a replacement LDP using the 'full revision' procedure.

Having prepared the Review Report and ahead of substantive work beginning on the revised LDP, the Council must now prepare, publish and agree with the Welsh Government (WG) a Delivery Agreement (DA) in accordance with Section 63 of the 2004 Planning and Compulsory Purchase Act. In line with national regulations and guidance, the DA must consist of the following:

- Community Involvement Scheme (CIS), which sets out how and when stakeholders and the community can contribute to the plan preparation process, and the timing and mechanisms used in undertaking such engagement; and
- Timetable for plan preparation and adoption, which once agreed by the Welsh Government commits the Council to preparing the revised LDP to the timescales identified.

Whilst there is no statutory requirement for the Council to undertake formal consultation on the preparation of a DA which relates to the revision of an LDP, it is considered prudent and beneficial to do so. Consequently the content of the Draft DA will be published for a 6 week formal consultation.

It should be noted that whilst the revised LDP is being prepared, the current adopted Plan (adopted December 2014) remains extant and will continue to provide the planning policy framework by which planning applications will be determined.

### 3. Key Elements of the Delivery Agreement

The timetable set out within the DA identifies a challenging, but realistic, timeframe for preparing the replacement LDP. From the start of the process in January 2018, it is anticipated that the revised LDP will be adopted by September 2021.

In preparing the timetable, regard has been had to the Welsh Government's expectation that a revised plan be prepared in less than 4 years, taking in to account the resources available to the local planning authority.

The main stages for plan preparation have been split in to Definitive and Indicative Stages as follows:

- Definitive Stages – These include the stages in plan preparation up to and including the statutory deposit stage (i.e. consultation on the 'Deposit Revised LDP'). These stages are deemed as under the control of the Council and as such, reflect a realistic assessment of what can be achieved within particular timescales.
- Indicative Stages – These include the stages of the plan preparation process after statutory deposit stage and up to and including adoption of the revised LDP. Their indicative nature reflects that the Council is able to exhibit less control over these stages given that they are influenced by, and subject to external factors, such as the number of representations received at deposit stage and the availability, requirements and capacity of the Planning Inspectorate.

It should be noted that at the deposit stage, an updated DA with definitive timescales for the final stages of plan preparation will be prepared and submitted to the Welsh Government for agreement.

### 4. Community Involvement Scheme

The CIS within the Draft DA sets out why it is important to involve the community. It identifies who should be involved and suggests how to get involved in the LDP process. It recognises the need to strengthen community involvement in order to achieve a plan that has local ownership and is legitimate for the policies that will shape the level and future distribution of growth and development within the County.

The Appendices of the DA will identify all of the bodies, agencies and organisations that will be consulted in accordance with the DA. The lists are not, however, exhaustive, and new consultees can be added at a later date. It should also be noted that an extensive mailing list has been compiled through the preparation of the current LDP. This mailing list ensures interested parties who may not be identified as consultees are informed of progress at appropriate stages of the Plan's preparation. New interested parties will be encouraged to register.

## 5. Sustainability Appraisal (SA) and Strategic Environmental Assessment (SEA)

It should be noted that the content of the Revised LDP will be informed by a variety of assessments, including an SA and SEA. The former is required by Section 62 (6a) of the Planning Compulsory Purchase Act 2004, while the latter is a requirement of the SEA Directive 2001/42/EC1. An SEA is a mandatory requirement for plans/programmes. The timetable and CIS also consider the integration of SA and SEA work as part of the plan preparation process.

## 6. Next Steps

Subject to Council's approval, the DA will be published for formal consultation for a 6 week period prior to the reporting of the responses received, and its submission to the Welsh Government for agreement. Once agreed, the DA commits the Council to producing the Revised LDP to the stated timescales and consultation processes.

It should be noted that officers are, as part of ongoing liaison, in discussion with officials from the Welsh Government on a number of matters pertaining to the preparation of the Revised LDP. One such matter relates to the timetable and the content of the LDP, the outcome of any such discussions will be incorporated into this report as it proceeds through to Council.

It should also be noted that the DA indicates that certain elements of the Pre-Deposit stage be undertaken concurrent with the consultation and ahead of the agreement on the DA. This will ensure that the Revised LDP is prepared in a timely manner consistent with the timetable outlined within the DA.

## 7. Site Assessment Methodology

One such element referred to above relates to the advertisement or 'call' for candidate sites. This represents a key stage as it provides landowners, interested parties and developers the opportunity to submit sites for consideration at the outset of Plan's preparation. Indeed it is at this stage where those wishing to propose sites for inclusion within the Deposit Plan, with its development limits, land use allocations and other site specific matters, must do so. In this respect the attached Site Assessment Methodology seeks to provide a framework for the consideration of such sites. It seeks to set out the Council's requirements from proponents of sites. It seeks to do this in a proportionate manner reflective of the scale and complexity of sites. The Methodology requires sites which are proposed as allocations to provide certain information around aspects such as access and viability to enable effective consideration of their deliverability.

It should be noted that the Methodology will be supplemented and developed to ensure the information requested is reflective of, and proportionate to, that stage of the Plan's preparation. The attached Methodology will also be developed as an online questionnaire to provide assistance and guidance on making a submission. It will also provide links to sources of data and information both on Council and relevant partner sites.

DETAILED REPORT ATTACHED?

YES

# IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report :

Signed: L Quelch

Head of Planning

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
<b>YES</b>	<b>YES</b>	<b>YES</b>	<b>YES</b>	<b>NONE</b>	<b>YES</b>	<b>YES</b>

## 1. Policy, Crime & Disorder and Equalities

The AMR, in monitoring the implementation of the LDP's policies and provisions, builds on the links and strategic compatibility between it and the **Integrated Community Strategy for Carmarthenshire 2012-17**. In this respect the Plan is a key factor in the delivery of the outcomes, particularly **Supporting Opportunities for the Building of Economically Viable and Sustainable Communities**. Through land use planning policies, the LDP seeks to promote the principles of sustainability and sustainable development by facilitating the creation of communities and local economies which are more sustainable, providing access to local services and facilities and reducing the need to travel.

The integration of sustainability as part of the preparation of the LDP is reflected in the undertaking of a Sustainability Appraisal and Strategic Environmental Assessment reflecting national and international legislative requirements. The formulation of the Revised LDP will closely consider matters of sustainability and will be prepared with the outcomes of the Plan measured in light of the Sustainability Appraisal indicators.

The DA, in identifying the timetable and CIS for the preparation of the LDP, recognises and reflects the requirements emanating from the Wellbeing of Future Generations Act and the implications for the LDP in general. In this respect, the LDP will have full regard to the national legislative provisions and will relate and have regard to the Carmarthenshire Well-being Plan. The LDP will assess compatibility of the LDP and the National and local Well-being Objectives. It is noted that the Revised LDP will ensure the requirements emanating from the Act are fully and appropriately considered with the Plan, reflective of its duties.

## **2. Legal**

The preparation of the LDP reflects the provisions of the Planning and Compulsory Purchase Act 2004, including the requirements of section 76 of the Act in keeping all matters under review that are expected to affect the development of its area.

The preparation of the Delivery Agreement is in accordance with Section 63 of the 2004 Planning and Compulsory Purchase Act. It is also in line with national regulations and guidance in relation to its scope and content.

## **3. Finance**

Financial costs to date are covered through the financial provisions in place - including reserves. Should the Planning Division Budget not be in a position to provide further funding necessary to meet the statutory requirements to review and prepare a development plan then an application will be made for a growth bid.

Subject to the scope and evidential requirements of the Revised Plan, then additional financial provision will be required to meet the ongoing costs associated with legislative requirements arising from its production, including ICT requirements (see below) evidence gathering and examination costs.

The Delivery Agreement, in making reference to such matters, outlines the Council's commitment to prepare and adopt an up-to-date LDP in accordance with the Council's statutory duty.

The identified requirements around the undertaking of a Sustainability Appraisal and Strategic Environmental Assessment, as well as a Habitat Regulations Assessment as part of the preparation of the LDP, is subject to consideration. In this respect, identified reserves may be set aside to meet anticipated costs.

## **4. ICT**

Requirements in relation to ICT will seek to utilise existing resources. There will however be additional and revised data management requirements to ensure the plan's preparatory process is conducted in a speedy, efficient and transparent manner in accordance with regulatory requirements.

This may require a new front facing consultation tool and its integration with back office systems.

## **6. Physical Assets**

The review of the LDP will impact on Council land and property holdings through their inclusion or otherwise for potential development purposes. This will have implications on potential disposal and land valuations and consequently capital receipts.

## 7. Staffing Implications

It is anticipated that the review of the LDP be accommodated utilising the existing staff structure. This will be reviewed subject to the nature and scope of the review. It is proposed to recruit a Support Officer to support and undertake specialist elements in relation to the Sustainability Appraisal and Strategic Environmental Assessment as well as a Habitat Regulations Assessment.

Provision will be required for a Programme Officer for the Examination into the LDP (anticipated 2020/21).

## CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: L Quelch

Head of Planning

### 1. Scrutiny Committee - 14<sup>th</sup> December 2017 – Community Scrutiny

### 2. Local Member(s)

The content of the DA and Site Assessment Methodology will be reported to Council for consideration. Members will be engaged throughout the LDP revision process. The content of the DA will be subject to a formal consultation process.

### 3. Community / Town Council

Town/Community Councils(s) will be a specific consultee at statutory stages throughout the LDP revision. The content of the DA will be subject to a formal consultation process.

### 4. Relevant Partners

A range of partners will be specific and general consultees throughout the review process. The content of the DA will be subject to a formal consultation process.

### 5. Staff Side Representatives and other Organisations

Internal contributions will be sought throughout the revision process.

**Section 100D Local Government Act, 1972 – Access to Information  
List of Background Papers used in the preparation of this report:  
THESE ARE DETAILED BELOW**

Title of Document	File Ref No.	Locations that the papers are available for public inspection
Carmarthenshire Local Development Plan		<a href="http://www.carmarthenshire.gov.wales/home/residents/planning/policies-development-plans/local-development-plan/">http://www.carmarthenshire.gov.wales/home/residents/planning/policies-development-plans/local-development-plan/</a>
Supplementary Planning Guidance		<a href="http://www.carmarthenshire.gov.wales/home/residents/planning/policies-development-plans/supplementary-planning-guidance/#.V06h-JwrKUK">http://www.carmarthenshire.gov.wales/home/residents/planning/policies-development-plans/supplementary-planning-guidance/#.V06h-JwrKUK</a>
Annual Monitoring Report 2015/16		<a href="http://www.carmarthenshire.gov.wales/media/1643860/Annual-monitoring-report-201516-AMR-Document-for-web.pdf">http://www.carmarthenshire.gov.wales/media/1643860/Annual-monitoring-report-201516-AMR-Document-for-web.pdf</a>
Annual Monitoring Report 2016/17		<a href="http://www.carmarthenshire.gov.wales/media/2172900/amr-16-17-eng.pdf">http://www.carmarthenshire.gov.wales/media/2172900/amr-16-17-eng.pdf</a>

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# 1. Introduction

## 1.1 Background

Section 69 (S69) of the Planning and Compulsory Purchase Act 2004 requires an LPA to undertake a review of an LDP and report to the Welsh Government at such times as prescribed. To ensure that there is a regular and comprehensive assessment of whether plans remain up-to date or whether changes are needed an authority should commence a S69 full review of its LDP at intervals not longer than every 4 years from initial adoption and then from the date of the last adoption following a review under S69 (Regulation 41).

Carmarthenshire County Council (the Authority) as part of the LDP process has undertaken a plan review report which has identified a requirement to undertake a full revision of its Development Plan. The issues considered within the report are of sufficient significance to support the preparation of revised Development Plan.

The plan review has drawn upon the published AMRs, evidence gathered through updated survey evidence, and pertinent contextual indicators to support this stance. In addition, Carmarthenshire's LDP will also have less than 4 years remaining on its lifespan at the end of 2017.

The current adopted Carmarthenshire LDP will remain the statutory development plan until it is replaced by a revised version of the LDP. The revised LDP will cover a Plan period from 1<sup>st</sup> April 2018 through to 31<sup>st</sup> March 2033.

Once adopted, decisions on planning permissions will be primarily based on its content. It will also form the basis for guiding future investment programmes including those of partner organisations and infrastructure providers. It will provide a measure of certainty about what kind of development will, and will not be permitted during the plan period. It determines the level of provision and location of new housing and employment opportunities, and sets the framework for considering all proposals that relate to the development and use of land and buildings during the plan period.

The Plan will take a positive role in identifying opportunities for growth and investment, including, the allocation of appropriate sites for development in a manner which is balanced against needs and considerations for the protection and enhancement of the natural and built environment. It will also consider the linguistic, social and cultural nature of the County's communities.

## 1.2 Purpose of this Delivery Agreement

As a requirement of the regulations set out above the Council is obliged to prepare and approve a Delivery Agreement (DA) for the LDP which must then in turn be approved by the Welsh Government (WG).

The DA is a public statement of the Council's commitment to the preparation of the LDP and how and when stakeholder, interested parties and communities can contribute to its preparation. The DA must be produced prior to the formal preparation of the LDP and will be subject to regular review. It is a key statutory stage in the preparation of the LDP, and

adherence to its agreed contents represents one of the tests of the soundness (See section X) at the public examination stage.<sup>1</sup>

As part of its preparatory process, LDP2 will undergo a number of key stages (See Table 2). This commences with the DA. The DA will consist of two parts: first a Timetable for producing the LDP and second a Community Involvement Scheme.

(i) **Timetable**

The timetable details the stages involved in the formulation and preparation of the LDP and how the Council proposes to project manage its preparation. The timetable will be divided into two stages (definitive and indicative) setting out the key parts of the process and where possible providing definitive dates. Those stages where indicative dates are given are generally post-deposit, where factors outside the Council's control may affect the process, for example the number of representations received in respect of the LDP during a given consultation exercise.

(ii) **Community Involvement Scheme**

This sets out how the Council intends to consult and engage with stakeholders and partners in a meaningful way throughout the LDP process. The DA contains lists of those groups, bodies and individuals that will be consulted during the LDP preparatory process. It should be noted that these lists are not exhaustive and will be added to as appropriate throughout the LDP process.

### 1.3 Stages in Delivery Agreement Preparation

The DA forms an important and statutory component in the preparation of a revised Local Development Plan. In this respect it is noted that at the Examination into the LDP, any deviations from the DA that have not been agreed with the Welsh Government will form an important test into the 'soundness' of the Plan. In this respect the DA, its timetable, and the methods which the Council utilise during the Plans preparation are fundamental in ensuring the Plan is prepared in an appropriate, timely and inclusive manner.

In developing a Delivery Agreement, the Authority is required to undertake the following stages:

- Prepare a draft DA;
- Consult on the Draft DA with Welsh Government (WG), and a draft timetable with the Planning Inspectorate (PINS), CADW and Natural Resources Wales (NRW);
- Undertake to consider and where appropriate revise its content following its consultation;
- Submit to Welsh Government for agreement.

Following its agreement by the Welsh Government, the DA will be published with the Plan prepared in accordance with its content.

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<sup>1</sup> To be adopted, a Local Development Plan must be determined 'sound' by the examination Inspector 64 of the 2004 Planning and Compulsory Purchase Act). Tests of soundness and checks are identified in Planning Policy Wales Edition 8, January 2016, Chapter 2 and the Local Development Plan Manual Chapter 8. <http://gov.wales/docs/desh/publications/151007local-development-plan-manual-edition-2-en.pdf>

## 1.4 Preparing the Revised LDP

The preparation of the revised LDP will have regard to relevant legislation, national policy, and other plans, strategies and guidance and European Directives. It will also recognise and have regard to regional and local plans and strategies with particular reference given to the provisions of the Councils well-being Plan, by providing the land use expression of a shared vision of how the County will develop and change over the Plan period.

The revised LDP will also be informed and supported through the development of an up to date evidence base. Key to its development however is the principles of engagement and consultation throughout its preparation. In this respect the timetable set out in Section 2 indicates the key stages of Plan preparation, whilst the Community Involvement Scheme details the nature of the consultation approaches used. During such consultation exercises, those wishing to do so may make comments on the assessments.

The culmination of the Plan making process will be the independent Examination of the LDP by a Planning Inspector appointed by the Welsh Government, who will consider matters relating to the soundness of the Plan. The findings of the Examination will be published in the Inspector's Report, and the content of which along with its recommendations is binding on the Authority.<sup>2</sup>

## 1.5 Tests of Soundness

In assessing the issue of soundness the Planning Inspector will have due regard to the evidence submitted with the Plan and the representations submitted at the Deposit stage. The Local Planning Authority (LPA) must comply with the preparation requirements and that it considers that the plan meets the 3 tests of soundness. The tests each have a series of questions which assist in indicating the matters that may be relevant under each test. The lists are neither exhaustive nor necessary apply in every case.

### Preparation Requirements:

- Has preparation complied with legal and regulatory procedural requirements? (LDP Regulations, CIS, SEA Regulations, SA, HRA etc?)<sup>3</sup>

### Soundness Tests:

**Test 1: Does the plan fit?** (i.e. is it clear that the LDP is consistent with other plans?)

#### Questions

- Does it have regard to national policy and WSP
- Does it have regard to Well-being Goals<sup>4</sup>
- Does it have regard the Welsh National Marine Plan
- Is it consistent with regional plans, strategies and utility programmes?
- Is it compatible with the plans of neighbouring authorities?

<sup>2</sup> Details in relation to the Plan making process can be found through the Local Development Manual 2 (2015). <http://gov.wales/docs/desh/publications/151007local-development-plan-manual-edition-2-en.pdf>  
The Planning Inspectorate - Local Development Plan Examinations Procedure Guidance (August 2015) <http://gov.wales/docs/desh/publications/170503ldp-procedure-guidance-en.pdf>

<sup>3</sup> PINS examination guidance is available from the PINS website <http://gov.wales/docs/desh/publications/170503ldp-procedure-guidance-en.pdf>

<sup>4</sup> As set out within the Well-being of Future Generations (Wales) Act 2015.

- Does it reflect the Single Integrated Plan (SIP) or the National Park Management Plan (NPMP)?

**Test 2: Is the plan appropriate?** (i.e. is the plan appropriate for the area in the light of the evidence?)

**Questions**

- Is it locally specific?
- Does it address the key issues?
- Is it supported by robust, proportionate and credible evidence?
- Can the rationale behind plan policies be demonstrated?
- Does it seek to meet assessed needs and contribute to the achievement of sustainable development?
- Are the vision and the strategy positive and sufficiently aspirational?
- Have the 'real' alternatives been properly considered?
- Is it logical, reasonable and balanced?
- Is it coherent and consistent?
- Is it clear and focused?

**Test 3: Will the plan deliver** (i.e. is it likely to be effective?)

**Questions**

- Will it be effective?
- Can it be implemented?
- Is there support from the relevant infrastructure providers both financially and in terms of meeting relevant timescales?
- Will development be viable?
- Can the sites allocated be delivered?
- Is the plan sufficiently flexible? Are there appropriate contingency provisions?
- Is it monitored effectively?

## 1.6 LDP Format and Content

To accord with guidance, the proposed draft structure of the revised LDP will be as follows:

- Introduction;
- Strategy (vision, strategic issues, key policies, key aims and objectives and monitoring targets etc.);
- Identification of Strategic and Regeneration Sites;
- Major allocations of land;
- Area wide policies for development;
- Specific policies and proposals for key areas of change or protection;
- Succinct reasoned justification to explain policies and to guide their implementation; and,
- Proposal maps on a geographical base.

## 1.7 How does the LDP relate to other Plans and Strategies?

In preparing the LDP, regard has been had to national guidance and other plans, policies and programmes. Relevant National, Regional and Local documents will be reviewed and considered as part of the Plan's preparation. The relationship and interaction with such documents will be reviewed and will develop throughout the Plan making process. Regard will also be had to any future Legislation, national Policy/Guidance and any Plans and Strategies which may emerge throughout the revision process, the implications of which will be considered.

## 1.8 Potential Preparation of Joint LDP

As part of any LDP revision process, consideration of the potential of preparing a joint LDP with neighbouring authorities is necessary and prudent. In this respect reference is made to the powers of Welsh Ministers to direct two or more authorities to act jointly in preparing an LDP / replacement LDP<sup>5</sup>.

As part of the process of preparing the LDP Review Report the advantages and disadvantages of preparing a joint replacement Plan with one or more neighbouring local planning authorities has been considered and is set out below.

- In considering the position of each authority and their respective LDPs, it is clear that both the City and County of Swansea and Neath Port Talbot are incompatible by virtue of their timetables for Plan preparation and review. In this respect Swansea at this time are yet to have an adopted LDP and are approaching examination, whilst Neath Port Talbot have a recently adopted Plan as such the review timing is not consistent with that of Carmarthenshire.
- Powys County Council also have compatibility issues in relation to the timing of their Plan, with an Inspectors Report anticipated towards the end of this year. This coupled with limited shared relationship would currently preclude any joint arrangement.
- The Brecon Beacons National Park Authority whilst occupying part of the County are not considered a viable option to the preparation of a joint plan. This reflects not only that only a relatively small part of their geographical area covers Carmarthenshire, but also that it would logistically require potential policy integration across a number of other Council areas.
- Other neighbouring authorities whilst presenting opportunities in terms of the timing of their review and revision processes raise issues in terms of compatibility. In this respect whilst Ceredigion has similarities to parts of Carmarthenshire in terms of the rural context there is a divergence in terms of the authorities on the respective economic collaborations, particularly in terms of the City Deal.
- Similarly, Pembrokeshire has significant differences in the economic and cultural nature that would make a Joint Plan potentially more complicated and lengthy to deliver. These include differences in economic drivers, Welsh language levels in communities, differences in the role of tourism, the particular relationship of Pembrokeshire to the National Park and the economic base of the different areas. This, together with the additional delay likely in developing and implementing a joint working arrangements, it is considered to outweigh any advantages of preparing a joint LDP.
- It is however clear that putting governance and compatibility issues aside, in the longer term a joint Plan between the three authorities and the Pembrokeshire Coast National Park Authority is a possibility. However this would be best considered once the revised LDPs of the respective authorities come up for review, allowing a forward programme of integration and collective working to be established in a period leading up to their review timetables.

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<sup>5</sup> Planning (Wales) Act 2015

Carmarthenshire will continue to work with all neighbouring Authorities and will, where appropriate, work collaboratively and in a collective manner on common approaches, including sharing and jointly preparing aspects around evidence to support the implementation and review/revision of the respective LDPs. At key stages, Joint Statements of Common Ground will be prepared as necessary, to provide clarity on shared approaches.

## 1.9 Sustainability Appraisal and Strategic Environmental Assessment

The requirement to undertake a Sustainability Appraisal (SA) is an integral part of the process of plan preparation and is mandatory under the Planning and Compulsory Purchase Act 2004. The SA will consider the LDP’s social and economic effects as well as the environmental aspects. A SA may be defined as follows:

“A systematic and interactive process undertaken during the preparation (and review) of a plan which identifies and reports on the extent to which implementations of the plan will achieve the environmental, social and economic objectives by which sustainable development can be defined and identifies opportunities for improving plan performance in relation to these”<sup>6</sup>.

European Directive 2001/42/EC is enacted in the United Kingdom through the Environmental Assessment of Plans and Programmes (Wales) Regulations 2004. It requires that that a formal environmental assessment is undertaken during the production of certain plans and programmes. In this regard, the undertaking of a Strategic Environmental Assessment (SEA) will require an iterative assessment of the impact of the LDP on the environment to be interwoven into the plan making process.

It is intended that the SA process will be combined with the requirements for an SEA into a single appraisal process (SA/SEA). This integrated approach will be utilised to inform the preparation of the plan from the outset. Statutory consultees will have a key role in the SEA process particularly environmental consultees (Cadw and Natural Resources Wales). In addition there are a number of statutory consultation requirements relating to the SEA. Table 1 sets out the key stages of the SA/SEA process.

<b>Table 1 <sup>7</sup>: SA/SEA Stages</b>
Stage A – Setting the context and objectives, establishing the baseline and deciding on the scope.
Stage B – Developing and refining options and assessing effects.
Stage C – Preparing the Sustainability Appraisal Report.
Stage D – Consulting on the preferred option of the development plan and SA Report.
Stage E – Monitoring significant effects of implementing the development plan.

In practical terms, it is proposed that the above requirements will be met as follows:

<sup>6</sup> *Sustainability Appraisals of Utility Development Plans: A Good Practice Guide (Welsh Government 2002)*

<sup>7</sup> *Local Development Plan Manual 2 – Welsh Government – June 2015*



- SA – SEA Scoping Report;
- Initial / Interim SA - SEA Report alongside the pre deposit Preferred Strategy;
- The SA – SEA Report alongside the Deposit LDP;
- Final SA-SEA report (incorporating any post Deposit LDP changes – e.g. any Focussed Changes and/or Matters Arising Changes).

### **1.10 Habitats Regulations Assessment**

European Directive 92/43/EEC is enacted in the United Kingdom through the Conservation of Habitats and Species Regulations 2010. These regulations clarify the responsibilities of the Plan Making Authority and set out the framework under which it should document the process. The Plan Making Authority should ultimately create a LDP that, as it is implemented, will have no significant effect (alone and in-combination) on the European Sites resource. The European Site resource includes; Special Area of Conservation (SAC), Special Protection Area (SPA), Ramsar and European Marine Sites (EMS).

The HRA, whilst not forming part of the SA/SEA, will however be prepared in parallel with it. The HRA will require an iterative assessment of the impact of the LDP on the European Sites resource to be interwoven into the plan making process.

In practical terms, it is proposed that the above requirements will be met as follows:

1. Preliminary Screening Report alongside the pre deposit Preferred Strategy;
2. HRA Report alongside the Deposit LDP (if 1 above cannot rule out any impact);
3. Final HRA report (incorporating any post Deposit LDP changes – e.g. any Focussed Changes and/or Matters Arising Changes).

### **1.11 Supplementary Planning Guidance**

Supplementary Planning Guidance (SPG) are produced to provide further detail on certain policies and proposals contained within an LDP. Their preparation helps ensure particular policies and proposals are better understood and applied more effectively. Whilst an SPG does not have the same status as adopted development plan policies, they may be taken into account as a material consideration in determining planning applications. There are currently a number of adopted SPG documents accompanying the LDP. These can be viewed on the Authority's website<sup>8</sup>.

SPG can be produced in the form of:

- Guidance on a particular topic
- Master plans
- Design guides
- Area development briefs

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<sup>8</sup> <http://www.carmarthenshire.gov.wales/home/residents/planning/policies-development-plans/supplementary-planning-guidance.aspx#.WeTFfhXythE>

A review of the current SPG will be undertaken to ensure they remain relevant and where appropriate updated accordingly. The extent of any amendments will become clearer as the LDP progresses towards adoption. The Authority also reserves the right to cancel any existing SPG where they are no longer relevant to the content of the revised LDP.

The revised LDP will contain sufficient policies and proposals to provide the basis for deciding planning applications. However, where appropriate and to aid the usability of the plan, and to ensure it remains concise, the Council will use SPG as a means of setting out more detailed guidance.



## 2. The Timetable

### 2.1 Key Stages Timetable

Table 2 sets out the proposed key stages and timetable involved in the preparation of the LDP as required under the provisions of the LDP Regulations<sup>9</sup> and the Planning and Compulsory Purchase Act 2004. A detailed timetable is set out Appendix 1.

**Table 2 – Key Stages Timetable**

Stage in Plan Preparation	Regulation Number	Timescale
<b>DEFINITIVE</b>		
Key Stage 1 - Delivery Agreement	5-10	October 2017 to May 2018
Key Stage 2 - Pre Deposit – Preparation and Participation	14	October 2017 – October 2019
Key Stage 3 - Pre-Deposit – Public Consultation	15,16	May 2018 – February 2019
Key Stage 4 - Deposit LDP	17-21	September 2018 – February 2020
<b>INDICATIVE</b>		
Key Stage 5 - Submission of LDP to WG for Examination	22	June 2020
Key Stage 6 - Independent Examination	23	July 2020 – January 2021
Key Stage 7 - Receipt and Publication of Inspector's Report	24	June 2021
Key Stage 8 - Adoption	25	September 2021
Key Stage 9 - Monitoring and Review	37	Continued following adoption

The stages identified in Table 2 are definitive as it is where the Council has direct control over the timetable. Those identified as indicative are where factors outside the Council's control may impact upon the process. The Council is however expected to define the indicative timetable within three months of the close of the formal six-week Deposit period and following consultation with the Planning Inspectorate. Such consultation will seek to establish the availability of an Inspector and to allow a check on the adequacy of the timetable in relation to the examination period. The revised timetable will be publicised in accordance with the general processes outlined in the Community Involvement Scheme.

### 2.2 Decision Making

#### Reporting

The approval at a meeting of the County Council will be required for those stages of the LDP preparatory process where consideration is to be given to representations received during formal consultation exercises, such as the deposit and strategic options stages. In addition, Executive Board and/or Full Council approval will normally be sought for those parts of the plan's preparatory process where it will be available as part of a formal public consultation exercise.

<sup>9</sup> *The Town and Country Planning (Local Development Plan)(Wales) Regulations (Edition 2)(August 2015)*

### **Advisory Panel**

The preparation of the Plan will be supported by the established LDP Advisory Panel with reports presented to the Panel and to the Executive Board and/or Full Council as appropriate.

The Advisory Panel is made up of a mix of elected Members across all the Political Parties. In guiding the formulation of the LDP throughout its process, the Panel will ensure that the plan is accountable.

The purpose of the LDP Advisory Panel will be to scrutinise, evaluate the input and views from the Key Stakeholder Forum and through the Plan making process. The Panel may also be required to arbitrate on any opposing viewpoints which may emerge with a view to reaching a consensus on key issues of policy and emerging Plan proposals.

The Panel's role and remit will continue post-LDP adoption through its consideration of future monitoring outputs. This will ensure continued political ownership and engagement. Members will be kept informed through council reports and the use of seminars and briefings.

### **Corporate Fit**

The Council is committed to the delivery of its corporate aims and objectives through its strategic and policy documents. The development of a corporate relationship between such documents is central to their effective delivery, with the LDP fundamental in giving expression to their land use aspirations. Developing on the LDP's position as a key strategic council document through corporate fit provides an opportunity to adopt a joined up or co-ordinated approach as part of its preparation. This will further assist by providing greater clarity and ensuring that work undertaken is not unnecessarily repeated elsewhere. Such documents will form part of the evidence base for the LDP.

### **Resources**

Whilst the Director of Environment will be responsible for the delivery of the LDP. The day to day aspects of its production and preparation through to adopted status rests with the Forward Planning Section of the Council's Planning Services Division. A team of officers and support staff whose principal role is the preparation of the LDP will be the main staff resource. A breakdown of the team responsible for the preparation of the LDP and the percentage of time involved in the production of the plan is as follows:

#### **LDP Team**

Head of Planning	(5%)
Forward Planning Manager	(60%)
Forward Planning Officer (x5)	(70%)
Monitoring and Implementation Officer	(30%)
Graphic Design and Technical Support Officer	(70%)
Administrative Assistant (Part time)	(75%)

Additional support for particular aspects of the LDP's preparation and production will be drawn from relevant areas of expertise within the authority.

It is also recognised that additional specialist assistance and services may be required. In this regard, the authority may supplement its own staff resources through the commissioning of consultants.

Experience indicates that the budgetary requirements of preparing the revised LDP through to adoption is expected to be broadly similar to that incurred by the production of the current

LDP. The Council will commit sufficient funds to ensure the LDP progresses in a manner consistent with the commitments set out within the DA. In addition, the Council may utilise reserve funds as appropriate to meet ongoing costs. General administration and staff costs associated with the production of the LDP are accounted for through separate budgetary structures.

### **Managing Risk**

In preparing the proposed timetable, regard has been had to the potential risks associated with the process. The authority is mindful of the impact of risks on the deliverability of the agreed timetable and the Community Involvement Scheme. Appendix 3 whilst not exhaustive, highlights those potential risks the authority may face in meeting the provisions of this DA.

In line with guidance, the timetable contains built in tolerances to account for potential slippage (3 months). However some risks identified may represent matters beyond such allowances, and as a consequence may result in slippage to the timetable. Proposed mitigation measures are included to address and minimise these potential risks.

## **3. Community Involvement Scheme**

### **3.1 Background**

This Community Involvement Scheme (CIS) sets out why it is important to involve the community. It identifies who should be involved and suggests how to get involved in the LDP process. It is vital in order to achieve a plan that has local ownership and is legitimate for the policies that will shape the future distribution of land uses and development within Carmarthenshire.

Carmarthenshire can be characterised as a county of contrasts with the agricultural economy and landscape of rural Carmarthenshire juxtaposed with the urban and industrial south-eastern area (see Appendix 4 for a County profile). The diversity in population (including distribution, age, employment and culture) presents a challenging task in involving the community in the LDP process.

### **3.2 Why Participate?**

As a land use planning document, the benefits and impacts of the LDP are most keenly felt within the communities of the County. With this in mind, the Council is keen to ensure that opportunities exist for all to participate in the preparation of the revised LDP. This opportunity to participate and communicate their views extends from understanding the issues faced through to the wording of detailed policies and site identification. It provides an opportunity to develop on the existing adopted LDP in preparing a revised replacement Plan for the next 15 years.

### **3.3 Key Stakeholder Forum**

A Key Stakeholder Forum similar to that utilised in the preparation of the current LDP will be established to assist in the Plan preparation process. Members of the Key Stakeholder Forum will have an important role to play in the key stages of the preparation of the Plan, in particular in drawing up the evidence base, consideration and assessment of the vision, objectives and options. It is envisaged at this stage that the Group's role will be effected through formal meetings, consultation on specific matters and general discussion throughout the key stages of the process up until the Deposit stage.

The purpose of the Forum is to act as a sounding board throughout the preparation process and will require regular involvement.

The Key Stakeholder Forum will be based on the existing Community Strategy Partnership and will also include representatives from key partnerships, together with selected representatives from groups and forums such as Community and Town Councils, partners including members of the Public Service Board, as well as Council Officers. Members of the Panel will consist of those with an interest directly affected by the LDP. A draft list of invitees is contained in Appendix 7. These may be subject to amendment as the preparation of the plan progresses, however it is considered vital to ensure that the Forum remains of a manageable size in order to enable constructive discussion and progress.

Members of the Forum will be required to meet the following expectations, in addition to the expectations set out under the general stakeholders

- Commit to the process – attend meetings/seminars and contribute to the process.
- Members will be representing the interests of the parent body, and it would be beneficial to the process if LDP information would be disseminated to colleagues in order to facilitate extended consultation on the Plan using existing structures.

Specific thematic groups may emerge from, and or develop to supplement the Key Stakeholder Forum and the preparation of the LDP as appropriate.

### **3.4 Involvement in the LDP Process**

The LDP will set out policies and proposals for future development and the use of land in the County. Therefore, anyone who lives, works, visits or has an interest in the future development of Carmarthenshire should get involved in the LDP process. Whilst it is recognised that it is not always possible or sometimes necessary, nor feasible to involve everyone in all stages of the process the Council is keen to ensure the opportunity is available for all to do so. This section identifies groups that may be involved and how they could be involved.

#### **Elected Members**

- Throughout the LDP process, the LDP Team will report to the Advisory Panel and at significant stages, reports will be prepared for Executive Board and/or full Council as appropriate.
- Member Briefings, Seminars and workshops will seek input and advise on the process and how and when decisions and input will be required.
- It is proposed that the Executive Board Member with responsibility for strategic planning and the Chair of Planning Committee should sit on the Key Stakeholder Forum.

#### **Specific Consultation Bodies**

- A list of Specific Consultation Bodies that the Council is required to consult with can be found in Appendix 5.
- Documents will be sent directly to these bodies at the identified stages (see Appendix 2) and a response will be expected within a reasonable timescale.

#### **Environmental Consultation Bodies**

- Organisations with a remit on environmental, social and/or economic matters and are able to provide advice on specialist issues.
- This will operate alongside the LDP process in ensuring that the LDP accords with sustainability criteria.

#### **General Consultation Bodies & Other Consultees**

- A list of general consultation bodies and other consultees that the Council is required to consult, and those which the Council consider should be involved as Consultees. These can be found in Appendix 5.
- These bodies will be advised by letter or e-mail at the identified stages. These can be found in Appendix 5.

### **Professional Officers**

- Internal representation from Development Management officers and other service areas, as well as where appropriate external partner organisations will feed in through thematic groups (and other fora) which cover the broad spectrum of topics within the LDP.
- Internal representation of other Council services is essential to ensure that the Plan is consistent with other Department's strategies and plans.

### **Youth**

- Young people are traditionally under-represented in the development plan process. The established Carmarthenshire Youth Council and the four Area Youth Fora (Amman Youth Forum, Forwm Y Cwm – Gwendraeth, Llanelli Youth Forum and 3T's Youth Forum – Carmarthen) will be used to ensure the views of the youth are considered in the process. Other means of accessing young people such as Carmarthenshire Young Farmers Clubs will be utilised.

### **Developers & agents**

- Developers and agents can request to be added to the Direct Mailing List (see below). They must, like the general public group, accept responsibility to ensure that any representations to the statutory stages are submitted within the correct timescale and with the information requested.
- Developers, agents and any other persons may submit any sites that they wish to be put forward for consideration during the non-statutory stages ("Candidate Site Register" stage). Details of these sites will be available for inspection on the Council's website and available to view at the Carmarthen Planning Office up until the Deposit Stage.
- Submitted sites will be assessed against the Site Assessment Methodology.

### **General public (direct mailing group)**

- This group includes anyone with an interest in the future of Carmarthenshire, including individuals, businesses, organisations and groups.
- Members of the public, groups or organisations may on request be included on the direct mailing list to inform of the progress of the plan and how they can be involved. Notification will be in the form of e-mail, or in exceptional circumstances through the postal service. Please note, however that it is the general public's responsibility to ensure that any representations to the statutory stages are submitted within the correct timescale and with the appropriate information as requested. Representations during formal consultation periods will be encouraged electronically and through the consultation portal. Where a postal service is used the Council will not be held responsible for the non-delivery of any item.
- All those who submit representations during statutory consultation periods will be automatically added to the mailing list.
- To register your interest please contact the Forward Planning Team by any of the following means:
  - ★ By e-mail: [forward.planning@carmarthenshire.gov.uk](mailto:forward.planning@carmarthenshire.gov.uk) ; or
  - ★ register on the on-line mailing database [www.carmarthenshire.gov.uk](http://www.carmarthenshire.gov.uk)
  - ★ by mail: Forward Planning, Carmarthenshire County Council, Planning Services, 5 Spilman Street, Carmarthen, Carmarthenshire SA31 1LQ.
- All registered persons will be advised by e-mail (unless specified otherwise through the absence of an email address) at identified stages (see Appendix 2).

### **Developers, Agents and other proponents of sites.**

There are a number of stages within the preparatory process of the revised LDP where sites may be proposed for potential inclusion within the LDP. Central amongst these are:

- The candidate site stage presents an early opportunity as part of the Pre-Deposit LDP stage to submit a site for consideration. The invitation for candidate sites will be advertised in accordance with this DA and should be provided using the forms available. Where additional information is requested to support the consideration of a site this should also be provided if the site is to receive full consideration.
- It is vital that proponents of sites maximise the opportunity for the promotion of the site by submitting them during the candidate site process. The candidate site stage is the appropriate point at which to submit a site so that sufficient consultation can take place to inform the examination process<sup>10</sup>.
- If there has been a material change in circumstances affecting a previously rejected site, or a completely new site is put forward, it is the responsibility of the proponent to test the effects of their site using the LPA SA framework. The LPA will provide guidance on what would be required for SA which the proponent would be expected to follow. <sup>11</sup>. The Authority does not however, give any assurance that such a change in circumstances would warrant or illicit a change which would be likely to see the site included within the Plan.
- There will be no vetting process to ensure that submissions are satisfactory in terms of SA: any vetting will take place as part of the examination before the Inspector since the SA is part of the evidence base that should support the policies and proposals in the deposit LDP. If a new, or alternative site has not been subject to any SA, it is unlikely that the Inspector will be in a position to recommend its inclusion in the LDP<sup>12</sup>.
- The LPA will consider all representations submitted at the pre-deposit public consultation stage in accordance with LDP Regulation 16(2) before finally determining the content of the deposit LDP. Representations made at this pre-deposit stage will not constitute representations to be considered at the independent examination<sup>13</sup>.
- It is at the Deposit Plan stage where the responsibility of those promoting changes to the Plan is required, in order to show that the proper procedures have been undertaken and to provide the necessary evidence to demonstrate that the plan would be sound if the site were to be included. This would include the site's compatibility with the SA<sup>14</sup>.
- All site submitted will considered in accordance with the provisions of the site assessment methodology.

### **Seldom Heard Groups**

This includes groups that have traditionally not taken part to any great extent in the plan process.

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<sup>10</sup> Local Development Plan Manual Edition 2 – para 5.3.4.3

<sup>11</sup> Local Development Plan Manual Edition 2 – para 6.5.1.5

<sup>12</sup> Local Development Plan Manual Edition 2 – para 6.5.1.6

<sup>13</sup> Local Development Plan Manual Edition 2 – para 6.5.1.8

<sup>14</sup> Local Development Plan Manual Edition 2 – para 7.4.4.7



- Such groups will be encouraged to participate through already established forums where possible. Throughout the process endeavours will be made to identify and involve these groups.
- It is proposed to involve these groups in the process by informing them at different stages of the process. Individual groups have been identified under General and Other Consultation Bodies (see Appendix 5).

The LDP Team will also work with colleagues in other service areas to maximise consultation opportunities including gaining access associations and forums.

Where petitions are submitted, one nominated person should be identified as a point of contact for involvement in the LDP process.

### **Town and Community Councils**

In preparing the revised LDP the authority recognises the important role of Town and Community Councils within their respective communities acknowledging their capability to communicate information and encourage engagement. As a reflection of this role and status as specific consultees (Appendix 5), the Council will consult with them at appropriate stages (including representation at the Key Stakeholder Forum).

Town and Community Councils and individual Councillors can provide an invaluable link and means of communicating with their communities. Their ability to raise awareness is clear but also critically is their potential to feedback and conveying views and comments back to the Plan making process.

There are 72 Town and Community Councils (135 seats) of varying sizes and budgets within the County. It is submitted that attending the meetings of each of these Councils on an individual basis would be impracticable due to resource issues. Where practicable, the Authority will however identify other appropriate methods of engagement for the Sector. Such methods could include a targeted / area based clustering approach – an example is the Gwendraeth Group of Community Councils. There are also opportunities to utilise the Authority's established Town and Community Council Liaison Forum.

The Authority will, where appropriate, seek to utilise the ongoing liaison with those larger Town and Community Councils in the County in relation to the duties emerging from the Well-being of Future Generations Act. A community or town council is subject to these duties where its gross income or expenditure was at least £200,000 for each of the preceding three financial years. It is understood that at the time of writing, the Councils that meet this criterion are Llanelli Town, Llanelli Rural, Pembrey and Burry Port, Carmarthen Town, Llannon, Cwmamman and Llanedi. There are therefore opportunities to utilise this existing platform to engage with these larger Councils on the LDP.

The Authority will also seek to engage with Town and Community Councils in relation to the potential contribution that Place Plans could make. In this regard, the Authority will monitor the release of any further guidance from the Welsh Government.

There are also a number of external organisations that could play an important role in supporting engagement with the Sector – including One Voice Wales and Planning Aid Wales. In relation to the former, reference is made to the well-established Area Committee structure, whilst Planning Aid Wales are established training providers for



the sector. There is also potential to seek out discussions with the Society of Local Council Clerks.

### **3.5 Expectations of Stakeholders**

It is important that all stakeholders and interested parties in the LDP process make every effort to meet the following expectations:

- (a) Respond to correspondence within an appropriate timescale – all correspondence & representations submitted will be replied to within a reasonable timescale and it is expected that stakeholders will reply to any correspondence within 21 days.
- (b) Stakeholders will only raise legitimate issues (Local Development Plan matters only).
- (c) Stakeholders should highlight any gaps in the data / information supplied.
- (d) Proponents of sites should identify them during the identified consultation periods. The Council is not obliged to consider, or forward any sites (or other representations) to the examination which have been submitted outside the defined consultation periods.
- (e) Proponents of a site, or respondents on any matter of the Plan should undertake to provide the information requested as necessary to allow an appropriate assessment of any submission or representation.
- (f) Relevant guidelines and procedures must be followed at all times.
- (g) Information should be shared and provided if required.
- (h) Stakeholders should accept that the Inspector's Report is binding and that no appeal in respect of his/her decisions can be made.
- (i) A commitment by all to consensus building.

Delays may occur if these expectations are not met and may result in the plan not according to the principles of soundness.

### **3.6 Late Representations**

The Council will only consider representations submitted in accordance with the advertised period of the consultation. Any representations received outside of these dates will be considered as a non-duly made representation, and the Council is not obliged to consider them. Only where the Council is satisfied that a genuine attempt in good faith to submit in time has been made, will a late representation be registered as duly made. Evidence of delivery, posting etc. will be required to support such claims. Such circumstances are expected to be exceptional and all potential respondents are encouraged to submit during the advertised periods.

To be registered as a duly made representation, they must supply the necessary information and specify the matters to which they relate. At Deposit stage representations must also specify the changes being sought, the grounds upon which the representation is made and where possible, the relevant test(s) of soundness.

Only those duly made representations at Deposit stage will be submitted to the Inspector for consideration at the examination. It should be noted that representations submitted during the Pre-Deposit Stage will not be submitted to the Inspector for consideration at the examination.

### **3.7 Methods of Involvement, Participation & Consultation**

A range of methods will be used to facilitate community involvement throughout the plan process including:

- Documents published and regular updates provided on the Council's website [www.carmarthenshire.gov.uk](http://www.carmarthenshire.gov.uk)
- The use of social media, including twitter updates, and Facebook news items from the Council's Social Media account
- 'Community News' – the Council's free newspaper which is delivered to all households in the area (published every month)
- Newsletters, online diaries and blogs where available.
- Direct mailing (preferably by e-mail, however by letter for those which seek this form of communication)
- Public Exhibitions
- Seminar / Workshops
- Documents made available at Customer Service Centres, Planning Offices and Public Libraries
- Press releases / Public Notices
- Meetings

### **3.7 Bilingual Engagement and the Welsh Language**

The preparation of the LDP will be undertaken in accordance with the Council's Welsh language standards with bilingual engagement essential in ensuring equal opportunity to engage in Plan preparation. In this respect the Council welcomes correspondence in Welsh and English and will enable all consultations to be undertaken in either language. All forms, documents, and correspondence, will be bilingual, with the opportunity for bilingual meetings also to be offered, thus affording the opportunity for people to engage in the language of their choice.

### **3.8 Consensus Building**

Better consultation and involvement may assist in a reduction of conflict in decision making. The consultation techniques proposed in this Scheme aim to reduce conflict and seek consensus, by using structured engagement and active involvement of stakeholders, communities and interested parties. It is important that agreement can be met with the overall strategy of the LDP in the early stages of the process.

Where consensus cannot be achieved, it is imperative that the sources of information leading to a decision are explicit and respected by all parties. In those instances where consensus cannot be reached regard will be had to pertinent matters such as national policy in determining any outcome. In appropriate instances where there is no conflict with such matters progression may be made on a majority basis.

### **3.9 Document Availability / Feedback**

All documents produced throughout the preparation of the LDP will be published on the Council's website and also made available at the following locations (locations may be subject to change):

- Customer Service Centres: 3 Spilman Street, Carmarthen  
The HUB, Llanelli Town Centre  
Town Hall, Ammanford
- Planning Offices: Civic Offices, Crescent Road, Llandeilo  
5-8 Spilman Street, Carmarthen
- All Public Libraries in Carmarthenshire (listed in Appendix X)

Where appropriate/required, copies of documents will be sent to Specific Consultation bodies.

### **3.9 Feedback Methods**

The Council's website will be used to provide up-to-date information and news on the progress of the LDP.

At all significant stages, consultation responses will be reported to the Advisory Panel, Full Council and/or the Council's Executive Board.

All representations received during the statutory consultation stages will be acknowledged, registered on a database and will be advised of the next steps in the process.

Regular updates will appear in "Community News" and through other media sources.

### **3.10 Monitoring and Review**

The Council will monitor and review the effectiveness of the DA throughout the preparation of the LDP. This will ensure that the objectives set out in the CIS are met in accordance with the proposed timetable.

Other instances in which the DA would need to be reviewed include:

- If there is significant changes in the resources available to the Council;
- If any significant changes are required to the CIS;
- If the LDP process falls significantly behind schedule, i.e. 3 months or more;
- If new European, UK or WG legislation, regulations or guidance should require new procedures or tasks to be undertaken; or,
- If there are any changes of circumstances that materially affect the delivery of the plan.

If the DA should require a review prior to Deposit, then this will be subject to further consultation with the relevant consultees as well as renewed approval from Council and the WG agreement.

The LDP Regulations state that, following Deposit, the timetable should be reviewed in consultation with the relevant consultees, and resubmitted to the WG as the Council enters into a service agreement with the Planning Inspectorate. This should be carried out within 3 months of the close of the formal Deposit period.

Following adoption of the revised LDP an Annual Monitoring Report (AMR) will be produced and published and submitted to the WG in accordance with regulations. The AMR will

establish how effectively the policies and proposals of the Plan are performing and being implemented. It will assess whether the basic strategy remains sound and whether any policies need changing to reflect contextual changes, including those of national policy. The AMR will also specify the housing land requirement (from the current Housing Land Availability Study) and the number of net additional affordable and general market dwellings built in the Authority's area, and report on other LDP indicators.

The Authority will commence a full review of the revised LDP at least once every 4 years. A timetable will be submitted to WG within 6 months of the Authority's decision to review the Plan. The review will include reconsideration of the sustainability appraisal and the soundness of the Plan. As with the AMR, the full review will also indicate whether alterations are needed to the Plan. Where a policy needs to be changed, or where additional policies are required, the process to be followed for plan revision will be the same as for plan preparation.

## Glossary

Adopted Plan	This is the Final stage of Local Development Plan preparatory process - where the Local Development Plan becomes the statutory Development Plan, for the purposes of the Act.
Adopted	The final confirmation of the development plan as its land use planning policy by the Local Planning Authority (LPA).
Annual Monitoring Report (AMR)	This will assess the extent to which policies in the local development plan are being successfully implemented (Regulation 37 of the Town and Country Planning (Local Development Plan) (Wales) Regulations 2005).
Baseline/Pre Change Baseline	A description of the present state of an area against which to measure change.
Candidate Site	Candidate Sites are those nominated by anyone for consideration by the LPA as allocations in an emerging LDP.
Candidate Sites Register	Register of candidate sites prepared following a call for candidate sites by the LPA.
Community	People living in a defined geographical area, or who share other interests and therefore form communities of interest.
Community Involvement Scheme (CIS)	Sets out the project plan and policies of the LPA for involving local communities, including businesses, in the preparation of local development plans. The CIS is submitted to the Welsh Government as part of the Delivery Agreement for agreement.
Consensus building	A process of early dialogue with targeted interest groups to understand relevant viewpoints and agree a course of action.
Consultation	A formal process in which comments are invited on a particular topic or set of topics, or a draft document.
Contextual Indicator	An indicator used to monitor changes in the context within which the plan is being implemented or prepared.
Delivery Agreement (DA)	document comprising the LPA's timetable for the preparation of the LDP together with its Community Involvement Scheme, submitted to the Welsh Government for agreement.
Deposit Documents	These include the deposit LDP, the Sustainability Appraisal report, the initial consultation report, the candidate sites register, the Review Report (if appropriate), any relevant supporting documents.
Development Limits	A line drawn in order to define the area of a settlement within which development is acceptable in principle subject to detailed consideration of environmental, amenity, access, public service provision and other considerations. Areas outside the limits are regarded as the open countryside.
Development management policies	A suite of criteria-based policies which will ensure that all development within the area meets the aims and objectives set out in the Strategy.
Engagement	A process which encourages substantive deliberation in a community. Proactive attempt to involve any given group of people/section of the community.
Evidence Base	Interpretation of Baseline or other information/data to provide the basis for plan policy

Focussed Change	Changes proposed to the deposit LDP prior to submission that are extremely limited in number, that reflect key pieces of evidence, but do not go to the heart of the plan.
Habitats Regulations Assessment (HRA)	<p>The screening and appropriate assessment of options required under Part 6 Chapter 8 of the Conservation of Habitats and Species Regulations 2010 (as amended) (the Habitats Regulations) - a recognised iterative process which helps determine the likely significant effect on a plan or programme and (where appropriate) assess adverse impacts on the integrity of a European site.</p> <p>The assessment is required to be undertaken by a competent authority in respect of plans or projects which are likely to have a significant effect (alone and in combination with other plans and projects) on a “European site” (see paragraph 5.1.2 of TAN 5), or as a matter of policy a proposed “European site” or Ramsar site, under the provisions of Article 6(3) of the EC Directive 92/43/ECC (the Habitats Directive), regulations 61 and 102 of the Conservation of Habitats and Species Regulations (as amended) 2010, and, regulation 25 of the Offshore Marine Conservation (Natural Habitats &amp;c) Regulations 2007.</p>
Indicator	A measure of variables over time, often used to a measure achievement of objectives.
Integrated Community Strategy	Required by the Local Government (Wales) Measure 2009 (Part 2: Sections 37-46) with the aim of improving the social, environmental and economic well-being of their areas. Also referred to as a “Single Integrated Plan”.
Local Development Plan (LDP)	<p>The required statutory development plan for each local planning authority area in Wales under Part 6 of the Planning and Compulsory Purchase Act 2004.</p> <p>A land use plan that is subject to independent examination, which will form the statutory development plan for a local planning authority area for the purposes of the Act. It should include a vision, strategy, area-wide policies for development types, land allocations, and where necessary policies and proposals for key areas of change and protection. Policies and allocations must be shown geographically on the Proposals Map forming part of the plan.</p>
Local Planning Authority (LPA)	A planning authority responsible for the preparation of an LDP.
Local Well-being Plan	Under The Well-being of Future Generations (Wales) Act 2015 Public Service Boards will be established for each local authority area; it is intended that each will prepare a Well-being Plan to replace the SIP by April 2018 (s.39).
Marine Plan	The Welsh National Marine Plan prepared under the Marine and Coastal Access Act 2009.
Mitigation	Measures to avoid, reduce or offset significant adverse effects.
National Development Framework (NDF)	Provision is made under Planning (Wales Act) 2015 for the preparation of an NDF. Prepared by the Welsh Government



	the NDF will set out a 20 year land use framework for Wales and will replace the current Wales Spatial Plan.
Objective/Strategic Objective	A statement of what is intended, specifying the desired direction of change in trends.
Partners	Other local/NP authority departments and statutory bodies where the LDP will help to deliver some of the objectives of their strategies. Partners may be expected to contribute to formulating relevant parts of the LDP.
Planning Obligation	A legal agreement between an applicant and the local planning authority to ensure a development is carried out in a certain way. Also referred to as a Section 106 Agreement.
Planning Policy Wales (PPW)	Planning Policy Wales sets out the land use planning policies of the Welsh Assembly Government. It is supplemented by a series of Technical Advice Notes. Procedural advice is provided through circulars and policy clarification letters.
Pre-deposit documents (LDP)	These include the vision, strategic options, preferred strategy, key policies, the Sustainability Appraisal report, the candidate sites register, Review Report (if appropriate).
Pre-deposit stage	The participation and consultation stages prior to deposit; the Manual refers to the Strategic Options and Preferred Strategy stage which relate to the full plan procedure; reduced requirements relate to the short form plan revision procedure.
RAMSAR	A wetland site of international importance for nature conservation. Designation is enabled by the Ramsar Convention 1971 whereby participating European Governments undertake to protect such areas.
Review Report	The required statutory report under S69 of the 2004 Act and/or Reg41; to conclude on the LDP revision procedure to be followed based on a clear assessment of what has been considered and what needs to change and why, based on evidence.
Short form revision procedure	May be appropriate for circumstances where the issues involved are not of sufficient significance to justify undertaking the full plan revision procedure.
Single Integrated Plan (SIP)	Discharges statutory duties identified by Welsh Government (“Shared Purpose – Shared Delivery”, WG 2012), including Community Strategies; prepared by a Local Service Board. See “Local Well-being Plans” which are to replace SIPs”.
Site specific allocations	Allocations of sites (proposals) for specific or mixed uses or development. Policies will identify any specific requirements for individual proposals with the allocations shown on the LDP’s proposals map.
Soundness	In order to be adopted, an LDP must be determined ‘sound’ by the examination Inspector (S64 of the 2004 Act).  Tests of soundness tests and checks are identified in PPW.
Special Area of Conservation (SAC)	Sites of international conservation importance designated by the Welsh Ministers under the European Directive on the

	Conservation of Natural Habitats and Wild Flora and Fauna. In addition there are candidate SAC's which should, as a matter of Government policy, be viewed as full SAC's when examining land use impacts.
Special Protection Area (SPA)	Special Protection Areas For Wild Birds under The E.C. Council Directive On the Conservation of Wild Birds (79/4C9/EEC) provides for the protection, management and control of all species of naturally occurring wild birds.
Stakeholders	Interests directly affected by the LDP (and/or SEA) - involvement generally through representative bodies.
Statement of Common Ground (SocG)	The purpose of a SOCG is to establish the main areas of agreement between two or more parties on a particular issue.
Strategic Development Plan (SDP)	Provision is made under the Planning (Wales) Act 2015 for the preparation of SDP's at a regional level. SDP will have regard to the NDF and responding at a regional level to strategic issues.
Strategic Environmental Assessment (SEA)	Term used internationally to describe environmental assessment as applied to plans and programmes. SEA process is derived from European legislation and defined at European level – Directive 2001/42/EC. The Environmental Assessment of Plans and Programmes (Wales) Regulations 2004 (SEA Regulations) require a formal “environmental assessment of certain plans and programmes, including those in the field of planning and land use”.
Supplementary Planning Guidance (SPG)	Forms a supplementary document/information in respect of the policies in an LDP. SPG does not form part of the development plan and is not subject to independent examination but must be consistent with the Plan and with national planning policy.  Can be developed to consider individual or thematic aspects of the Plan and site allocations including masterplans.
Sustainability Appraisal (SA)	Tool for appraising policies to ensure they reflect sustainable development objectives (i.e. social, environmental and economic factors). Each LPA is required by S62(6) of the 2004 Act to undertake SA of the LDP. This form of SA fully incorporates the requirements of the SEA Regulations.
Sustainability Appraisal Report (SA Report)	document required to be produced as part of the SA process to describe and appraise the likely significant effects on sustainability of implementing the LDP, which also meets the requirement for the Environmental Report under the SEA Regulations. S62(6) of the 2004 Act requires each LPA to prepare a report of the findings of the SA of the LDP. - The SA Report is first produced at the Preferred Strategy stage (the Interim SA Report), expanded at the Deposit LDP stage and finalised alongside the Adoption Statement.
Technical Advice Notes (TAN)	A topic-based document published by the Welsh Assembly Government to supplement Planning Policy Wales.
Wales Spatial Plan (WSP)	A plan prepared and approved by the National Assembly for Wales under S60 of the 2004 Act, which sets out a














	<p>strategic framework to guide future development and policy interventions, whether or not these relate to formal land use planning control. Under S62(5)(b) of the 2004 Act a local planning authority must have regard to the WSP in preparing an LDP.</p>
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### Appendix 1: Revised Carmarthenshire Local Development Plan - Timetable

	2018				2019				2020				2021															
	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D	J	F	M	A	M	J	J	A	S	O	N	D
<b>Annual Monitoring Report</b>																												
AMR2 to Council for approval to submit	■																											
Submission of AMR2 to WG		■																										
<b>LDP Review Report</b>																												
LDP Review Report to enter Council cycle for approval			■	■	■																							
Preparation and Publication of the LDP Review Report			■	■	■																							
<b>Key Stage 1: Delivery Agreement</b>																												
Preparation of draft Delivery Agreement (DA)		■	■	■																								
Report draft DA to Council					■																							
Publication of Draft DA for consultation					■	■	■																					
Consideration and reporting of consultations received						■	■	■																				
Submission to WG for approval								■	■																			
Publication of approved DA following WG approval								■	■																			
<b>Key Stage 2: Pre-Deposit Preparation and Participation</b>																												
Review and develop baseline information and evidence	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Review and develop Strategic Options, Issues & Objectives					■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
SA Stage A: Prepare SA (SEA) Scoping Report					■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Consultation on the SA (SEA) Scoping Report					■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Assessment, consideration and reporting of representations received on the SA (SEA) Scoping Report					■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Invitation for submission of Candidate Sites					■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Publication of Candidate Site Register									■	■																		
<b>Key Stage 3: Pre-Deposit Consultation</b>																												
Prepare and report SA (SEA) initial / interim report									■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Prepare and report HRA Screening Report									■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Prepare and report the Preferred Strategy									■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
SA Stage B: Publication and consultation of Preferred Strategy (inc Strategic Sites)									■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Publication and consultation of the initial / interim SA (SEA) Report and HRA Screening Report									■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Assessment and consideration of responses received on the Preferred Strategy, initial SA (SEA) and HRA Screening Report										■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Report Preferred Strategy and Options, SA (SEA) and HRA										■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Publication of Initial Consultation Report										■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
<b>Key Stage 4: Deposit Consultation (Reg 17, 18, 19)</b>																												
Preparation of Deposit Plan, HRA Report and SA (SEA) Report										■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Reporting of draft Deposit LDP, SA (SEA) and HRA										■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Publication of draft Deposit LDP, SA (SEA) and HRA for consultation											■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Assessment and Consideration of the representations received in respect of draft Deposit Plan, SA(SEA) Report and HRA Report												■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Reporting of representations of the Deposit LDP, SA (SEA) Report and HRA Report												■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
Focussed Changes													■	■	■	■	■	■	■	■	■	■	■	■	■	■	■	■
<b>Key Stage 5</b>																												
<b>Submission to WG (Reg 22)</b>																												
<b>Key Stage 6</b>																												
<b>Examination (Reg 23)</b>																												
<b>Key Stage 7</b>																												
<b>Publication of Inspectors Report (Reg 24)</b>																												
<b>Key Stage 8</b>																												
<b>Adoption (Reg 25)</b>																												
<b>Key Stage 9</b>																												
<b>Monitoring and Review (Reg 37)</b>																												







## Appendix 2: Timetable and Community Involvement

Stage	Purpose	Timescale*	Who to involve?	How?	Reporting Mechanism
<b>Key Stage 1 - Delivery Agreement (Regulations 5 – 10)</b>					
Preparation of draft Delivery Agreement (DA)	To ensure that roles and responsibilities are understood and realistic timetables are developed.	<b>October 2017 – January 2018</b>	<ul style="list-style-type: none"> <li>LDP Team</li> <li>Executive Board</li> </ul>		
Publication of draft DA for consultation	To enable all stakeholders and interested parties to submit representations.	<b>January 2018 – March 2018</b>	<ul style="list-style-type: none"> <li>LDP Team</li> <li>Council Officers</li> <li>LDP Advisory Panel</li> <li>Key Stakeholder Forum</li> <li>Specific Consultation bodies (see appendix 5)</li> <li>General &amp; Other Consultation bodies (see appendix 5)</li> </ul>	    	Comments will be considered & DA amended, if required.
Assessment and consideration of feedback and responses received	To allow consideration of representations received.	<b>March 2018 – April 2018</b>	<ul style="list-style-type: none"> <li>LDP Team</li> <li>LDP Advisory Panel</li> </ul>	 	A summary of the comments received and response will be reported to members.
Submission of DA to WG	To seek formal agreement on the content of the DA.	<b>April 2018</b>	<ul style="list-style-type: none"> <li>Welsh Government</li> </ul>		
Publication of approved Delivery Agreement following WG approval	To inform stakeholders of the content and availability of the approved DA.	<b>April - May 2018</b>	<ul style="list-style-type: none"> <li>LDP Team</li> <li>LDP Advisory Panel</li> <li>Key Stakeholder Forum</li> <li>Specific Consultation bodies</li> </ul>	  	Copies of agreed DA placed on Council's website and placed at Deposit locations.






















## Appendix 2: Timetable and Community Involvement

Stage	Purpose	Timescale*	Who to involve?	How?	Reporting Mechanism
			<ul style="list-style-type: none"> <li>General &amp; Other Consultation bodies</li> </ul>	 	
<b>Key Stage 2 - Pre-Deposit: Preparation and Participation (Regulation 14)</b>					
Review and develop baseline information and evidence	<p>To understand and develop the context for plan preparation, to review and to supplement data to identify issues and objectives to be addressed in the LDP.</p> <p>This will be ongoing throughout the LDP process.</p>	<b>October 2017 – October 2019</b>	<ul style="list-style-type: none"> <li>LDP Team</li> <li>LDP Advisory Panel</li> <li>Specific Consultation bodies</li> <li>General &amp; Other Consultation bodies</li> </ul>	   	Prepare evidence base through to the submission of the Deposit LDP.
Review and develop Strategic Options, Issues and Objectives	To develop a vision for the Plan area and the objectives for the LDP and influence the choice of a preferred option.	<b>January 2018 – February 2018</b>	<ul style="list-style-type: none"> <li>LDP Team</li> <li>Council Officers</li> <li>LDP Advisory Panel</li> <li>Key Stakeholder Forum</li> <li>Council Members</li> <li>Town and Community Councils</li> </ul>	 	Agreed vision & objectives published on Council's website and placed at Deposit locations.
SA Stage A: Setting the context & objectives, establishing the baseline & deciding on the scope. (Known as the SA Scoping Report) and undertake consultation.	To engage environmental consultation bodies & relevant stakeholders to develop SA objectives and to provide a baseline to inform the	<b>January 2018 – February 2018</b>	<ul style="list-style-type: none"> <li>Environmental consultation bodies</li> <li>Council Officers</li> <li>LDP Team</li> <li>LDP Advisory Panel</li> <li>Specific Consultation bodies</li> </ul>	     	Report will be published on Council's website and placed at Deposit locations.












## Appendix 2: Timetable and Community Involvement

Stage	Purpose	Timescale*	Who to involve?	How?	Reporting Mechanism
	next stage of option appraisal.		<ul style="list-style-type: none"> <li>General &amp; Other Consultation bodies</li> </ul>		
Assessment and consideration of representations received in respect of SA Scoping Report	To allow consideration of representations received.	<b>February 2018 – March 2018</b>	<ul style="list-style-type: none"> <li>LDP Team</li> <li>LDP Advisory Panel</li> </ul>		A summary of the comments received and response will be reported to members.
Candidate Site Register	An invitation for the submission of candidate sites.	<b>January 2018 – May 2018</b>	<ul style="list-style-type: none"> <li>All interested parties</li> </ul>		Site register database
Publication of Candidate Site Register	To allow interested parties to view the candidate sites received	<b>May 2018</b>	<ul style="list-style-type: none"> <li>All interested parties</li> </ul>		Site Register database
<b>Key Stage 3 - Pre-Deposit: Consultation (Regulations 15 and 16)</b>					
Preparation and Reporting of the Preferred Strategy and Options to include consideration of strategic sites	To provide an opportunity for stakeholders and interested parties to contribute to the preparation of the Preferred Strategy and suggest modifications.	<b>May 2018 – August 2018</b>	<ul style="list-style-type: none"> <li>LDP Team</li> <li>LDP Advisory Panel</li> <li>Council Officers</li> </ul>		Published on the Council's website and deposited at locations as appropriate.
SA Stage B: Developing & refining option & assessing effects (known as Initial / Interim SA report)	To ensure strategic options and sites are assessed against the proposed SA framework to inform and support	<b>May 2018 – August 2018</b>	<ul style="list-style-type: none"> <li>Environmental consultation bodies (see para.1.7.3)</li> <li>LDP Team</li> <li>LDP Advisory Panel</li> <li>Specific Consultation bodies</li> </ul>		Report will be published on Council's website and placed at Deposit locations.











## Appendix 2: Timetable and Community Involvement

Stage	Purpose	Timescale*	Who to involve?	How?	Reporting Mechanism
	the Pre-Deposit Preferred Strategy.		<ul style="list-style-type: none"> <li>Key Stakeholder Forum</li> <li>General &amp; Other Consultation bodies</li> </ul>	    	
HRA Initial Screening Report	The main aim of this report is to complete the first part of the HRA process and provide a constraints plan to inform and support the Pre-Deposit Preferred Strategy.	<b>May 2018 – August 2018</b>	<ul style="list-style-type: none"> <li>Environmental consultation bodies (see para.1.7.3)</li> <li>LDP Team</li> <li>LDP Advisory Panel</li> <li>Specific Consultation bodies</li> <li>Key Stakeholder Forum</li> <li>General &amp; Other Consultation bodies</li> </ul>	       	Report will be published on Council's website and placed at Deposit locations.
Publication and Consultation of Preferred Strategy (Inc. Strategic Sites), initial / interim SA (SEA) Report and HRA Screening Report	To provide an opportunity for stakeholders and interested parties to contribute to the preparation of the preferred strategy, the initial / interim SA (SEA) Report and HRA Screening Report and suggest modifications.  Identification of potential sites that correspond with the preferred strategy.	<b>September 2018 – October 2018</b>	<ul style="list-style-type: none"> <li>All stakeholders &amp; interested parties</li> </ul>	       	The documents will be published on Council's website and placed at Deposit locations.

## Appendix 2: Timetable and Community Involvement








Stage	Purpose	Timescale*	Who to involve?	How?	Reporting Mechanism
Assessment and consideration of representations received on the Preferred Strategy, initial SA (SEA) and HRA Screening Report	To allow consideration of representations received.	<b>November 2018 – January 2019</b>	<ul style="list-style-type: none"> <li>▪ LDP Team</li> <li>▪ LDP Advisory Group</li> <li>▪ Key Stakeholder Forum</li> </ul>	 	A summary of the comments received and response will be reported to members.
Publication of Initial Consultation Report	To identify the consultation methods undertaken as part of the Community Involvement Scheme	<b>September 2018</b>	<ul style="list-style-type: none"> <li>▪ All stakeholders and interested parties</li> </ul>		A summary of the consultations and publications undertaken as part of the pre-deposit preparation and participation.
<b>Key Stage 4 - Deposit LDP (Regulations 17 – 19)</b>					
Prepare and report Deposit LDP, SA (SEA) Report (Stage C) and HRA Report (if needed).	Develop the Deposit LDP out of preceding LDP stages.	<b>September 2018 – June 2019</b>	<ul style="list-style-type: none"> <li>▪ LDP Team</li> <li>▪ LDP Advisory Group</li> <li>▪ Key Stakeholder Forum</li> </ul>		Report to Council to obtain their approval for consultation of Deposit LDP and supporting documents – SA/SEA and HRA (if needed).
Publication and consultation of Deposit LDP and associated documents (including HRA (if needed) and SA report (Stages C/D).	To enable all stakeholders and interested parties to submit representations to the LDP and supporting documents.	<b>July 2019 – September 2019</b>	<ul style="list-style-type: none"> <li>▪ All stakeholders &amp; interested parties</li> </ul>	     	Duly made representations acknowledged by e-mail/letter.
Assessment, consideration and reporting of representation received	To allow consideration of representations received.	<b>October 2019 – February 2020</b>	<ul style="list-style-type: none"> <li>▪ LDP Team</li> <li>▪ LDP Advisory Group</li> </ul>	 	A summary of the representations received and response will be reported to members,

## Appendix 2: Timetable and Community Involvement










Stage	Purpose	Timescale*	Who to involve?	How?	Reporting Mechanism
in respect of Deposit LDP and associated documents (including HRA (if needed) and SA report (Stage D).					published on the Council's website and placed at Deposit locations.
<b>Key Stage 5 - Submission of LDP to the Welsh Government &amp; the Planning Inspectorate for Examination</b>					
Submission of LDP and associated documents (incl. SA Report) to Welsh Government & the Planning Inspectorate for examination	<ul style="list-style-type: none"> <li>To submit the LDP and associated documents to WG and the Planning Inspectorate for independent examination.</li> </ul>	<b>June 2020</b>	<ul style="list-style-type: none"> <li>LDP Team</li> <li>WG</li> <li>PINS</li> </ul>	   	
<b>Key Stage 6 - Independent Examination (Regulation 23)</b>					
Publication of Notice of Independent examination.	To ensure that stakeholders are advised that an independent examination of the LDP will be taking place.	<i>July 2020</i>	<ul style="list-style-type: none"> <li>All stakeholders and interested parties</li> </ul>	 	
Pre-examination meeting	To allow the independent planning Inspector appointed by WG to advise on examination procedures & format.	<i>September 2020</i>	<ul style="list-style-type: none"> <li>All stakeholders and interested parties</li> <li>Planning Inspectorate</li> <li>LDP Team</li> <li>General and other Consultant bodies</li> </ul>	   	



## Appendix 2: Timetable and Community Involvement

Stage	Purpose	Timescale*	Who to involve?	How?	Reporting Mechanism
Examination of the Plan	To provide an impartial planning view on the soundness of the Plan and the representations submitted in respect of it.	<i>September 2020 – January 2021</i>	Round table sessions, informal hearings, representations and written submissions.		
Reporting Commences (22 weeks)	Inspector's deliberations	<i>January 2021</i>	Planning Inspectorate		
<b>Key Stage 7 - Receipt and Publication of the Inspector's Report (Regulation 24)</b>					
Receipt of the Inspector's Report	To receive the Inspector's report in respect of the examination into the LDP. The report will detail changes recommended, such changes are binding on the authority.  The Inspector's Report will be checked for any factual inaccuracies.	<i>June 2021</i>	<ul style="list-style-type: none"> <li>▪ LDP Team</li> </ul>		
Publication of the Inspector's Report	To inform all stakeholders, interested parties and respondents of the Inspector's decisions.	<i>June 2021</i>	<ul style="list-style-type: none"> <li>▪ All stakeholders &amp; interested parties</li> </ul>	    	
<b>Key Stage 8 - Adoption (Regulation 25)</b>					
Formal adoption of the Carmarthenshire LDP	To inform all stakeholders, interested	<i>September 2021</i>	<ul style="list-style-type: none"> <li>▪ All stakeholders &amp; interested parties</li> </ul>		Publication of formal Notice of Adoption

## Appendix 2: Timetable and Community Involvement

Stage	Purpose	Timescale*	Who to involve?	How?	Reporting Mechanism
Publication of adoption Statement and notification to WG	parties and respondents of the adoption of the LDP.			   	
Publication of SA Report (Stage D)	To inform all stakeholders, interested parties and respondents.	<i>September 2021</i>	<ul style="list-style-type: none"> <li>All stakeholders &amp; interested parties</li> </ul>	    	Publication of formal Notice of Adoption
<b>Key Stage 9 - Monitoring and Review (Regulation 37)</b>					
Monitoring & Review	<p>To ensure that the LDP is achieving its targets.</p> <p>Consider a partial or full review of the LDP if necessary (a full review will commence within 4 years)</p>		<ul style="list-style-type: none"> <li>LDP Team</li> <li>LDP Advisory Panel</li> <li>Council Members</li> </ul>	Specialist surveys & data collection	<p>Publication of the LDP's Annual Monitoring Report.</p> <p>Commencement of LDP Review, if necessary</p>
SA Stage E: Monitoring significant effects	To review the performance of the Plan against the SA Monitoring Framework		<ul style="list-style-type: none"> <li>LDP Team</li> </ul>	Data collection	Publication of the LDP's Annual Monitoring Report

### Appendix 3 – Risk Assessment and Mitigation

The proposed timetable for plan preparation as set out within this Delivery Agreement is considered to be realistic and achievable, and having regard to the scope and programme of works the Authority believes to be involved, to existing Welsh Government regulations and guidance, and to the resources available to the Authority to commit to plan preparation.

While the Authority is committed to making every effort to avoid deviations from the proposed timetable, there are a number of potential risks which need to be considered. The following table outlines these risks along with their potential impacts and identified methods of mitigation.

Risk	Potential Impacts	Mitigation
Availability of adequate funding.	Programme slippage which could result in a delay in adoption of the revised LDP beyond the life of the current LDP (2021), thereby creating a policy void if a revised LDP was not adopted before this date.	Monitor and keep under review ensuring that as appropriate bids are submitted for any additional funding.
Staff resources	Programme slippage and potential difficulties and timing issues in replacing qualified and experienced planners.	Monitor and keep under review.
Council reporting structure and decision making.	Programme slippage.	Liaise closely with democratic services to ensure requirements are planned and programmed accordingly. Ensure documentation is prepared in a timely manner.
Application of the Welsh language standards and resultant translation requirements.	Programme slippage.	Liaise closely with translation services to ensure requirements are planned and programmed accordingly. Ensure documentation is prepared in a timely manner.
Printing and other production issues	Programme slippage.	Liaise closely with relevant provider and service areas to ensure requirements are planned and programmed accordingly. Ensure documentation is prepared in a timely manner.
Additional requirements arising from changes in legislation and national policy.	Requirement for additional work with resultant programme slippage.	Monitor emerging changes and respond early to changes where this is possible.

Changes in other Plans and strategies	Requirement for additional work with resultant programme slippage.	Maintain close liaison with other service areas and partners and monitor emerging changes and respond early to changes where this is possible.
Legal challenge	LDP quashed with resultant additional workload and resource requirements.	Ensure procedures, legislation and regulatory provisions are complied with.
Insufficient information available to ensure assessment of proposals	Programme slippage.	Identify expectations of respondents within this DA and through supporting guidance documents.
Significant objections from statutory bodies	Requirement for additional and potentially significant work. This may raise issues in terms of resources and timetabling of future stages.	Ensure the views of statutory bodies are sought and considered as early as possible with liaison throughout the Plan making process. Ensure implications are monitored and where necessary additional resources identified.
Failure to satisfy the tests of soundness	Adoption of the LDP would not be able to proceed without considerable additional work. Consequential substantive delay would mean the existing LDP post would cease in 2021, thereby creating a policy void if a revised LDP was not adopted before this date.	Ensure revised LDP is sound, founded on a robust evidence base with SA. Maintain liaison with Welsh Government and other key consultees to ensure that any issues and early warnings on potential issues are recognised and responded to.
Planning Inspectorate unable to meet the timescale for examination & reporting	Examination and/or report delayed. Could result in a delay in adoption of the revised LDP beyond the life of the current LDP thereby creating a policy void if a revised LDP was not adopted before this date.	Ensure close liaison with the Planning Inspectorate to ensure any potential for delays are understood and accounted for.

**Appendix 4 – Community Population Totals and County Profile****Community Population Totals**

<b>Community Ward</b>	<b>Population (Census 2011)</b>
Abergwili	1,612
Abernant	297
Ammanford	5,411
Betws	2,175
Bronwydd	564
Carmarthen	14,185
Cenarth	1,030
Cilycwm	487
Cilymaenllwyd	742
Cwmamman	4,486
Cynwyl Elfed	1,044
Cynwyl Gaeo	940
Dyffryn Cennen	1,176
Eglwyscummin	432
Gorslas	4,066
Henllanfallteg	480
Kidwelly	3,523
Laugharne Township	1,222
Llanarthne	765
Llanboidy	1,061
Llanddarog	1,198
Llanddeusant	220
Llanddowror	851
Llandeilo	1,795
Llandoverly	2,056
Llandybie	10,994
Llandyfaelog	1,304
Llanedi	5,664
Llanegwad	1,473
Llanelli	25,168
Llanelli Rural	22,800
Llanfair-ar-y-Bryn	624
Llanfihangel Aberbythych	1,334
Llanfihangel RhosyCorn	468
Llanfihangel-ar-Arth	2,213
Llanfynydd	499
Llangadog	1,311
Llangain	573
Llangathen	507
Llangeler	3,427

Llangennech	4,964
Llangunnor	2,381
Llangyndeyrn	3,102
Llangynin	284
Llangynog	492
Llanllawddog	703
Llanllwni	638
Llannon	5,270
Llanpumsaint	734
Llansadwrn	517
Llansawel	438
Llansteffan	941
Llanwinio	448
Llanwrda	514
Llanybydder	1,638
Llanycrwys	235
Manordeilo & Salem	1,754
Meidrim	582
Myddfai	398
Newcastle Emlyn	1,184
Newchurch & Merthyr	676
Pembrey & Burry Port	8,547
Pencarreg	1,169
Pendine	346
Pontyberem	2,768
Quarter Bach	2,921
St Clears	2,995
St Ishmael	1,370
Talley	494
Trelech	745
Trimsaran	2,541
Whitland	1,792

**County Profile**

**2015 – Mid Year Population Estimates**

<b>Age Structure</b>	<b>Carms Population</b>	<b>Carms %</b>	<b>Wales Population</b>	<b>Wales %</b>
<b>Aged: 0-4</b>	<b>9,937</b>	<b>5.4</b>	<b>175,922</b>	<b>5.7</b>
<b>5-14</b>	<b>20,667</b>	<b>11.2</b>	<b>344,756</b>	<b>11.1</b>
<b>15-24</b>	<b>20,708</b>	<b>11.2</b>	<b>400,205</b>	<b>12.9</b>
<b>25-44</b>	<b>40,141</b>	<b>21.7</b>	<b>737,577</b>	<b>23.8</b>
<b>45-64</b>	<b>51,542</b>	<b>27.8</b>	<b>815,853</b>	<b>26.3</b>
<b>65-74</b>	<b>23,453</b>	<b>12.7</b>	<b>346,097</b>	<b>11.2</b>
<b>75+</b>	<b>18,675</b>	<b>10.1</b>	<b>278,676</b>	<b>9.0</b>
<b>Total</b>	<b>185,123</b>	<b>100</b>	<b>3,099,086</b>	<b>100</b>

## Appendix 5 (List currently under development)

### Specific Consultation Bodies

- **Welsh Government**
- **Natural Resources Wales**
- **CADW**
- **Department of Transport**
- **Department of Energy and Climate Change**
- **Department of Trade and Industry**
- **Dwr Cymru/Welsh Water**
- **Home Office**
- **Ministry of Defence**
- **Network Rail**
- **Carmarthenshire Public Service Board**
- **Hywel Dda Health Board**
  
- **Adjoining Local Authorities**
  - Brecon Beacons National Park Authority
  - Ceredigion County Council
  - Neath Port Talbot County Borough Council
  - Pembrokeshire Coast National Park Authority
  - Pembrokeshire County Council
  - Powys County Council
  - City & County of Swansea
  
- **Community & Town Councils (within Carmarthenshire)**
  - Abergwili Community Council
  - Abernant Community Council
  - Ammanford Town Council
  - Betws Community Council
  - Bronwydd Community Council
  - Carmarthen Town Council
  - Cenarth Community Council
  - Cil-y-cwm Community Council
  - Cilymaenllwyd Community Council
  - Cwmamman Town Council
  - Cynwyl Elfed Community Council
  - Cynwyl Gaeo Community Council
  - Dyffryn Cennen Community Council
  - Eglwys Gymyn Community Council
  - Gors-las Community Council
  - Henllan Fallteg Community Council
  - Kidwelly Town Council
  - Laugharne Town Council
  - Llanarthne Community Council
  - Llanboidy Community Council
  - Llanddarog Community Council
  - Llanddowror Community Council
  - Llandeilo Town Council
  - Llandovery Town Council
  - Llandybie Community Council
  - Llandyfaelog Community Council

- Llanedi Community Council
- Llanegwad Community Council
- Llanelli Rural Council
- Llanelli Town Council
- Llanfair-ar-y-Bryn Community Council
- Llanfihangel Aberbythych Community Council
- Llanfihangel ar Arth Community Council
- Llanfihangel Rhos y Corn Community Council
- Llanfynydd Community Council
- Llangadog Community Council
- Llangain Community Council
- Llangathen Community Council
- Llangeler Community Council
- Llangennech Community Council
- Llangyndeyrn Community Council
- Llangunnor Community Council
- Llangynin Community Council
- Llangynog Community Council
- Llanllawddog Community Council
- Llanllwni Community Council
- Llannon Community Council
- Llanpumsaint Community Council
- Llansadwrn Community Council
- Llansawel Community Council
- Llansteffan Community Council
- Llanwinio Community Council
- Llanwrda Community Council
- Llanybydder Community Council
- Llanycrwys Community Council
- Maordeilo & Salem Community Council
- Meidrim Community Council
- Myddfai Community Council
- Newcastle Emlyn Town Council
- Newchurch & Merthyr Community Council
- Pembrey & Burry Port Town Council
- Pencarreg Community Council
- Pendine Community Council
- Pontyberem Community Council
- Quarter Bach Community Council
- St Clears Town Council
- St Ishmael Community Council
- Talley Community Council
  - Trelech a'r Betws Community Council
  - Trimsaran Community Council
  - Whitland Town Council
- **Community & Town Councils adjoining Carmarthenshire: that lie in the Brecon Beacons National Park:**
  - Llanddeusant

**that lie in Ceredigion:**

- Beulah
- Lampeter
- Llandyfriog
- Llanddewi Brefi
- Llandysul
- Llanfair Clydogau
- Llanwenog
- Llanwnnen

**that lie in Neath Port Talbot:**

- Cwmllynfell
- Gwaun-Cae-Gurwen
- Pontardawe

**that lie in Pembrokeshire:**

- Amroth
- Clunderwen
- Clydau
- Crymych
- Lampeter Velfrey
- Llanddewi Velfrey
- Manordeifi
- Mynachlog-Ddu

**that lie in Powys:**

- Llangammarch
- Llanwrtyd Wells Town
- Llywel
- Maescar
- Ystradgynlais Town

**that lie in Swansea:**

- Gorseinon
- Grovesend
- Llŵchwr
- Mawr
- Pontarddulais

▪ **Persons (a) to whom the electronic communications code applies by virtue of a direction given under section 106(3) of the Communications Act 2003 & (b) who owns or controls electronic communications apparatus situated in any part of the authority's area (where known**

- **Communications**
  - BT Group plc
  - Openreach
  - 3 (Three)
  - Tesco Mobile
  - O2 (UK) Ltd
  - OFCOM
  - EE
  - T-Mobile UK (UK) Ltd
  - Utilita

- Virgin Media Ltd
- Vodafone Ltd
- **Persons whom a license has been granted under S6(1)(b) or (c) of the Electricity Act 1989**
  - Celtic Energy
  - Countryside Energy
  - Ecotricity
  - EDF
  - Good Energy Ltd
  - National Grid Company plc.
  - NPower Ltd
  - Scottish Power
  - Southern Electric
  - SSE
  - SWEB
  - United Utilities
  - Wales & West Utilities Ltd
  - Western Power Distribution
- **Persons whom a license has been granted under S7(2) of the Gas Act 1986**
  - British Gas
  - Transco
  - Wales Gas
- **Other Bodies (not identified by LDP Wales):**
  - Civil Aviation Authority
  - Coal Authority
  - Defence Estates
  - 
  - HM Prison Service
  - Mobile Operators Association (Mono Consultants)

**General Consultation Bodies**

- **Voluntary bodies:**
  - Age Concern
  - Carmarthenshire Association of Voluntary Services (CAVS)
  - Communities First Partnerships:
    - Felinfoel Partnership
    - Glanymor & Tyisha Partnership
    - Llwynhendy Partnership
    - Pantyffynnon Partnership
    - Upper Amman Valley Partnership
  - Shelter Cymru
  - Youth Hostel Association
- **Bodies which represent the interests of different racial, ethnic or national groups:**
  - Advisory Council for the Education of Romany & other Travellers
  - All Wales Ethnic Minority Association
  - Black Environment Network Wales
  - Black Voluntary Sector Network Wales
  - Citizen's Advice Bureau
  - The Ethnic Minority Foundation
  - Gypsy & Traveller Law Reform Coalition
  - The Gypsy Council
  - Minority Ethnic Women's Network



- National Association of Health Workers with Travellers
  - National Association of Teachers of Travellers
  - National Travellers Action Group
  - Welsh Women's National Coalition
  
  - **Bodies which represent the interests of different religious groups in the area:**
    - Baptist Union of Wales
    - The Catholic Church in England and Wales
    - Church in Wales
    - Hindu Council UK
    - Jehovah's Witnesses
    - The Methodist Church in Wales
    - Muslim Council of Wales
    - The Presbyterian Church in Wales
    - Religious Society of Friends – Quakers
    - Wales Orthodox Mission
    - The Salvation Army
    - The Union of Welsh Independents
  
  - **Bodies which represent the interests of disabled persons in the authority's area:**
    - Royal National Institute for the Blind
    - Royal National Institute for the Deaf and Hard of Hearing People
    - Spinal Injuries Association
    - Wales Council for the Blind
    - Wales Council for the Deaf
  
  - **Bodies which represent the interest of persons carrying on business in the authority's area:**
    - Antur Cwm Taf / Tywi
    - Antur Teifi
    - CBI Wales
    - Confederation of Business Industry
    - Community Legal Service
    - Environmental Services Association
    - Federation of Small Businesses
  
  - **Bodies which represent the interests of the Welsh language and culture in the authority's area:**
    - Cymdeithas yr Iaith Gymraeg
    - Cymuned
    - Merched y Wawr
    - Mentrau Iaith
    - Wales Rural Forum
- Other Consultation bodies**
- (Those in **bold** have been taken directly from suggested list in LDP Wales)
- Action for Market Towns
  - ADAS Wales
  - Age Concern Cymru
  - **Airport Operators** – Pembrey Airport
  - Assembly Members – Carmarthen East & Dinefwr
  - Assembly Members – Mid & West Wales
  - Arena Network
  - Arts Council for Wales
  - **British Aggregates Association**
  - **British Geological Survey**
  - British Horse Society
  - British Trust for Conservation Volunteers
  - **British Waterways, canal owners and navigation authorities**
  - British Wind Energy Association
  - BTCV Cymru
  - Cambria Archaeological Trust
  - Cambrian Mountains Society
  - Campaign for the Protection of Rural Wales
  - Campaign for Real Ale
  - Carmarthen Civic Society
  - Carmarthenshire Community Health Council
  - Carmarthenshire Fishermens Federation
  - Carmarthenshire Historic Buildings Preservation Trust
  - Carmarthenshire Local Access Forum
  - Carmarthenshire Tourist Association
  - Carnegie Rural Community Development Programme
  - Carmarthenshire Youth Council
  - Carnegie Young People Initiative
  - Chamber of Trade & Commerce:
    - Carmarthen Chamber of Commerce
    - Llanelli Chamber of Trade
    - Ammanford Chamber of Trade
    - Newcastle Emlyn Chamber of Trade
    - Llandeilo Chamber of Trade
    - St Clears Chamber of Trade
  - Children in Wales
  - Children's Play Council
  - **Centre for Ecology and Hydrology**
  - **Chambers of Commerce, local CBI and local branches of Institute of Directors**
  - Civic Trust for Wales
  - **Civil Aviation Authority**
  - Clic
  - **Coal Authority**
  - Coastguard Regional Office
  - Coed Cymru
  - Coleg Sir Gar
  - **Commission for Racial Equality**
  - Community Action Network Wales
  - Community Development Foundation
  - Community Matters
  - Community Development Xchange
  - Community Transport Association
  - Council for Wales of Voluntary Youth Services
  - **Country Landowners and Business Association**
  - Council for the Protection of Rural Wales
  - **Crown Estate Office**
  - Carmarthenshire Youth and Children's Association
  - Cymdeithas Tai Cantref
  - **Design Commission for Wales**
  - **Disability Wales**

- **Disability Rights Commission**
- **Disabled Persons Transport Advisory Committee**
- **Electricity, Gas and Telecommunications Companies and the National Grid Company**
- **Environmental groups at national and regional level**
- **Environmental Services Agency (Waste)**
- Environment Wales
- **Equal Opportunities Commission**
- European Council for the Village & Small Town
- **Fire & Rescue Services** - Mid & West Wales Fire & Rescue Service
- Foothold
- **Forestry Commission Wales**
- **Freight Transport Association**
- Friends of the Earth Cymru
- Funky Dragon
- General Aviation Awareness Council
- Groundwork Wales
- **Gypsy Council**
- **Health and Safety Executive (HSE)**
- Housing Associations:
  - Bro Myrddin Housing Association
  - Cymdeithas Tai Cantref
  - Family Housing Association
  - Tai Cymdogaeth
- **Farmers Union Wales**
- **Federation of Small Businesses**
- **The Home Builders Federation**
- Kidwelly Civic Trust Society
- **Local community, conservation and amenity groups, including Agenda 21 Groups/Civic Societies:**
- Menter Cwm Gwendraeth
- Menter a Busnes
- Milltir Sgwar
- Laugharne Civic Trust Society
- Llanelli Civic Society
- Llandovery Civic Trust
- MPs – Carmarthen East & Dinefwr
- MPs – Mid & West Wales
- Members of the European Parliament (MEPs)
- **Local transport operators:**
  - First Cymru
  - National Express
  - Veolia
  - Hyder Consulting (UK) Ltd
  - LARA
  - Llandeilo Access Group
  - National Air Traffic Services Ltd
- **National Farmers Union for Wales**
- National Museums & Galleries of Wales
- **National Playing Fields Association**
- National Society of Allotment & Leisure Gardens Ltd
- National Trust
- National Wind Power
- National Youth Agency
- **Network Rail + Train Operating Companies:**
  - Arriva Trains Wales
  - First Great Western Trains
  - Railtrack
  - Virgin Trains
- **One Voice Wales**
- On Common Ground
- Open Space Society
- **Planning Aid Wales**
- Play Wales
- **Police Architectural Liaison Officers** – Dyfed Powys Police
- **Port Operators**
- **Post Office Property Holdings**
- **Professional Bodies not specifically listed:**
  - Royal Institution of Chartered Surveyors Wales
  - Royal Town Planning Institute in Wales
  - Chartered Institute of Housing Cymru
  - Institution of Civil Engineers
  - Chartered Institution of Waste Management
  - Royal Society of Architects in Wales
  - Royal Commission on Ancient & Historical Monuments in Wales
- **Quarry Products Association Wales**
- **Rail Freight Group**
- Rail Users Consultative Committee for Wales
- **Ramblers Association**
  - Carmarthen Ramblers Group
  - Dinefwr Ramblers Group
  - Llanelli Ramblers Group
- Road Haulage Association
- Road Safety Council of Wales
- Royal National Lifeboat Institution
- RSPB Cymru
- Rural Youth Network
- Scarman Trust
- South Wales Sea Fisheries Committee
- South & West Wales Wildlife Trust
- **Sports Council for Wales**
- Sustrans Cymru
- Tai Cymru Housing Association
- Tir Cymin
- Transport 2000
- **Traveller Law Reform Coalition**
- Trinity College
- Valuation Office – Mineral Valuer
- **Wales Council for Voluntary Action**
- Wales Environmental Compact
- **Wales Environment Link**
- **Welsh Government:** Department for the Economy and Transport
- **Welsh Government:** Department for Education, Culture and Welsh Language
- **Welsh Government: Welsh Language Commissioner**
- **Welsh Government: Wales Tourist Board**
- Wales Tourism Alliance
- **Water Companies:**
  - Dwr Cymru/ Welsh Water
- Welsh Association of Community & Town Councillors
- Welsh Association of Youth Clubs
- Welsh Historic Gardens Trust

- Welsh Local Government Association
- **Welsh Environmental Services Association (representing waste industry)**
- Welsh Health Estates
- Welsh Youth Forum on Sustainable Development
- Wildlife Trust Wales
- The Woodland Trust Wales
- Young Enterprise
- Young Farmers (Wales)
- Youth Access
- Youth Fora:
  - Amman Youth Forum
  - Forwm y Cwm-Gwendraeth
  - Llanelli Youth Forum
  - 3Ts Youth Forum - Carmarthen

### **Multi-Agency Partnerships for Carmarthenshire**

(taken from the “2007 Directory of Multi-Agency Partnerships for Carmarthenshire”)

#### **Community Planning Partnerships**

- Community Partnership Forum
- Community Planning Steering Group
- Community Planning Working Group
- Carmarthenshire Leisure Forum
- The Community Networks
- Voluntary Sector Liaison Committee
- Voluntary Sector Forum

#### **Health, Social Care & Well Being Partnerships**

- Health, Social Care & Well Being Partnership Forum
- Health, Social Care & Well Being Modernisation Board;
- Health Social Care & Well Being Strategy Implementation Group;
- Supporting People Planning Group
- Multi-Agency Reference Group for Carers
- Unscheduled Care Project Board
- Wanless Implementation Group
- Priority 1 & 2 Performance Management Group
- DToC Delivery Group
- Unified Assessment Process Project Board
- Carmarthenshire Mental Health Planning & Commissioning Team
- Joint Planning & Commissioning Team for People with Learning Disabilities
- Services for Older People Planning Group
- Services for Physically Disabled & Sensory Impaired People Planning Group
- Carmarthenshire Disability Coalition for Action

- Open Link/Mental Health Forum
- North Carmarthenshire Mental Health Forum
- Tobacco Control Forum
- Healthy Schools Initiative
- Housing Planning Group
- Housing Renewal Strategy Working Group
- Housing Association Liaison Group
- Homelessness Forum
- Tenants & Residents Associations / Tenant Community Networks

#### **Lifelong Learning Partnerships**

- Lifelong Learning Opportunities Steering Group
- Children & Young People’s Framework Partnership

#### **Regeneration Partnerships**

- Carmarthenshire Regeneration Partnership
- Carmarthenshire Regeneration Executive
- Objective 1 Group
- Priority 3 Sub Group
- Grwp Cefn Gwlad
- Regeneration Action Teams

#### **Environment Partnerships**

- Environment Partnership Strategy Group
- Local Biodiversity Action Plan Partnership
- Local Access Forum
- South West Wales Community Rail Partnership
- Carmarthenshire Waste Forum
- Voluntary Sector Environment Forum

#### *Safer Communities Partnerships*

- Community Safety Partnership
- Substance Misuse Action Team
- Domestic Abuse Forum

#### **Other Partnerships of Interest**

- Community Legal Services Partnership
- Welsh Government Voluntary Sector Partnership Council
- Social Care Regional Partnership
- South West Wales Economic Forum
- Carmarthenshire Volunteer Organisers’ Network
- Carmarthenshire Strategy for Older People Steering Group
- Felinfoel Communities First Partnership
- Glanymor & Tyisha Communities First Partnership
- Llwynhendy Communities First Partnership
- Pantyffynnon Communities First Partnership
- Upper Amman Communities First Partnership

## Appendix 6: Public Libraries within Carmarthenshire

- Ammanford
- Bedol (Garnant)
- Brynaman
- Burry Port
- Carmarthen
- Kidwelly
- Llandeilo
- Llandovery
- Llanelli
- Llangennech
- Llwynhendy
- Newcastle Emlyn
- Pembrey
- Pontyates
- Pontyberem
- St Clears
- Whitland

### Mobile Libraries (routes)

- Llangadog / Llanddeusant
- Farmers / Llansadwrn / Talley/ Brechfa
- Rhydcymerau
- Hendy
- Cwmann / Llanybydder / Llanllwni
- Login / Llanglydwen
- Trimsaran / Mynyddygarreg / Ferryside
- Cilycwm / Llanwrda
- Drefach Felindre / Tanglwst / Cynwyl Elfed
- Llannon / Drefach / Mynyddcerrig
- Llanfynydd / Nantgaredig / Capel Dewi
- Blaenwaun / Trelech / Meidrim
- Pendine / Llansadurnen / Laugharne
- Llanybri / Llansteffan / Llangain
- Peniel / Llanpumsaint / Pencader

Correct as of August 2017, please consult the web page for location and update:

<http://www.carmarthenshire.gov.wales/home/residents/libraries-archives/find-a-library.aspx#.WYiGxE-ouUm>

## Appendix 7: Key Stakeholder Forum (Prospective Membership – subject to review)

- Carmarthenshire Association of Voluntary Services (CAVS)
- Coleg Sir Gar
- Carmarthenshire County Council
- Dyfed Powys Police
- Welsh Government - Department for Education, Culture and Welsh Language
- Natural Resources Wales
- University of Wales Trinity Saint Davids
- Carmarthenshire Local Health Board
- Welsh Government – Business and Economy
- Welsh Government – Environment and Rural Affairs
- Chamber of Commerce
- Federation of Small Businesses
- Confederation of Business Industry
- Community Legal Service
- Arts Council of Wales
- Community & Town Councils (2 urban & 2 rural)
- Cadw
- Dyfed Archaeological Trust
- National Farmers Union
- Farmers Union Wales
- Young Farmers representative
- Youth representatives
- Executive Board Member for Environment (Carmarthenshire County Council)
- Chair of Planning Committee (Carmarthenshire County Council)

Each organisation will normally be represented by a **single** nominated member with an expectation to attend and participate through the process to maintain continuity and consistency.

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## 1. INTRODUCTION

- 1.1 This document sets out the methodology for evaluating the suitability of potential development sites for inclusion in the revised Carmarthenshire Local Development Plan (LDP).
- 1.2 In doing so, it identifies the guiding principles for reviewing land previously allocated in the current Local Development Plan (adopted December 2014), and for establishing potential new site allocations and development limit changes, consistent with national planning policy, the LDP Vision and strategic options and the LDP Preferred Strategy.
- 1.3 Sites for consideration include those on the Candidate Site Register, sites allocated but undeveloped within the LDP, and any other sites considered appropriate.
- 1.4 This document will be used as part of the evidence base to support the Authority's approach towards identifying those sites included within the revised LDP, in addition to those omitted from the Plan.
- 1.5 The methodology is prepared to reflect National Planning Policy and legislative provisions to ensure that the identification of sites is founded on a robust and credible assessment of the suitability and availability of land. The deliverability of sites will be an important aspect of the methodology and will be essential in the identification of sites for inclusion within the revised LDP.
- 1.6 All these factors will, where appropriate, be addressed through consultation with specific consultation bodies during the evaluation of sites, whilst promoters of land will be required to provide an appropriate level of detail to allow a full consideration of their sites.
- 1.7 This methodology will form the basis for the consideration of sites throughout the preparatory process of the revised LDP. It will however be subject to ongoing iteration to provide further information in relation to requirements and specific considerations at subsequent stages. In this respect the following provides further clarity on the candidate site stage.

### **Candidate Sites**

- 1.8 The Local Development Plan Manual – Edition 2 (August 2015) advises that early engagement should take place with developers and landowners to obtain information on candidate sites. It is vital that promoters of sites appreciate that bringing them forward after the candidate site stage will mean that it is unlikely they can be considered for inclusion in the Deposit version of the Plan.
- 1.9 The submission of sites at the candidate site stage should not be interpreted as a commitment that they will be included within the Plan. To be considered they will need to meet a criteria-based assessment as set out in this Methodology Paper. It should be noted that the invitation for candidate site submissions will be undertaken over a set period of time, as specified within the Delivery Agreement, and is supported by stakeholder engagement leading up to this stage. Any sites which are submitted outside this time period for the invitation of sites will be deemed as 'not-duly made'.
- 1.10 It should be noted that sites submitted as part of the candidate site process will be made available for public viewing as part of the Pre-deposit Preferred Strategy. However, the assessment to support the inclusion or exclusion of the sites within the LDP will be considered at the revised Deposit LDP stage, when interested parties will have the opportunity to comment.

## 2. SITE ASSESSMENT METHODOLOGY

- 2.1 This methodology aims to provide framework for the comprehensive appraisal of the development potential of sites. It is however noted that this cannot replicate the detail considerations required through a planning application. Rather, it is designed and intended to provide confidence around the acceptability and deliverability of sites for inclusion within the Development Plan.
- 2.2 The LDP stages for landowners, agents and developers to get involved are highlighted below in chronological order:
- The invitation to allow promoters of land to submit sites for inclusion within the revised Local Development Plan. Such submissions may include a range of uses including: residential, employment, retail etc. The invitation also includes potential to submit sites to safeguard from development.

### **Preferred Strategy stage**

- The strategic sites are published for consultation within the revised Preferred Strategy. Such sites will be selected to reflect their contribution to the delivery of the LDP Strategy.
- The register of candidate sites is published with the Preferred Strategy. At the Preferred Strategy stage, it is not a consultation to support or object to site submissions.

### **Deposit LDP**

- The Deposit LDP will indicate those sites which are both included and excluded from the Plan. This includes sites allocated for a particular land use as well as those areas protected and safeguarded, in addition to the drawing of development limits around settlements. Representations may be submitted as part of the Deposit LDP consultation process. Representations, including those on sites submitted during this stage will be presented for consideration at the Examination as below.

### **LDP Examination**

- The Deposit LDP, the Pre-Deposit documents, along with all the responses submitted as part of every consultation stage will be submitted for examination to be considered by an independent Planning Inspector. It should be noted that comments and representations submitted during Pre-Deposit stages will not be for consideration at the Examination.



### 3. THE CANDIDATE SITE PROCESS

3.1 The candidate site submission form sets out the questions necessary to fulfil the requirements of the methodology. This will allow an assessment of the site and its deliverability to take place. The Site Assessment Methodology for the Candidate Site Stage will include criteria to filter sites out where they may be contrary to National Policy, or unsuitable due to overarching constraints. A landowner or developers commitment to the delivery of the site, and additional supporting evidence including the potential viability of a site will be important factors. This will be drawn out from the submission form.

3.2 There is a requirement to undertake a Sustainability Appraisal (SA) as well as a Strategic Environmental Assessment (SEA) as part of the preparation of the LDP. It is intended that the SA process will be combined with the requirements for an SEA into a single appraisal process (SA/SEA). The Council will also need to create a LDP that will have no significant effect (alone and in-combination) on the European Sites resource (Habitats Regulations Assessment - HRA) during its implementation. In this regard, those emerging proposals (including site selection) will need to be informed by an iterative review against such frameworks as the plan making process proceeds towards deposit.

#### **Candidate Site Stage**

3.3 In conjunction with the invitation for candidate sites, the Authority will re-evaluate and where appropriate consider the sites which are allocated for such uses within the existing Local Development. Development sites which may have planning permission (outline or detailed) will not necessarily be carried forward as allocations in the revised Plan. Consideration will be given to the commitment of the landowner/developer, as well as the viability and other informing factors for bringing that site forward. Landowners who have current allocations that are undeveloped (irrespective of planning status), should re-submit these as candidate sites during this period.

3.4 Reference should be drawn to the population and household projections for Carmarthenshire and the proposed reduction in the household requirements. It is clear in certain instances there will be sites submitted as part of the candidate site process which may be suitable, however they may be omitted simply on the grounds of appropriate land elsewhere, which has been supported by robust evidence of their deliverability.

3.5 The potential implications arising from any revision to the LDP Strategy and settlement framework will also have an impact on site selection. In this respect, the role and function of the settlement, along with its position within the settlement framework will have a direct bearing on the selection of sites.

3.6 Each candidate site will be subject to an assessment process identified in the chapter below, and in each instance, the type of use being proposed needs to be made clear.

3.7 The format of the methodology follows the detail requested within the candidate site submission form.

#### **Assessment of Strategic Sites**

3.8 The Council will assess the deliverability of sites for strategic delivery against the criteria set out in Appendix 1. The sites will be published for consultation within the revised Preferred Strategy. Regard will be given to the emerging SA/SEA framework, and the HRA initial screening with a view to reviewing any effects at pre-deposit stage.

## Assessment of Non-Strategic Sites

3.9 There are 2 phases to the non-strategic sites assessment as set out below.

- Phase 1 will assess those sites that would contribute towards meeting the LDP objectives, including those for housing, employment land allocations and other land uses which are annotated within the LDP Proposals Maps.
- Phase 2 - In relation to those sites that proceed through Phase 1 and are to be included within the Deposit LDP stage, the Council will ensure that they are reviewed against the SA/SEA framework and potentially the HRA.

3.10 It should be noted that the sieving process outlined below reflects a number of established sustainability principles and represents an important mechanism in screening sites in advance of any formal assessment through phase 2.

## PHASE 1

3.11 The LDP Manual (edition 2) states that “to avoid unduly raising expectations of development in totally unsuitable locations” the Council should publish a clear public statement indicating the types of location which would be judged to be sustainable.

3.12 The settlement framework will seek to guide future development within the County whilst at the same time affording the necessary protection to the environment. In particular, the Authority considers that new housing proposals should be directed to settlements where they will lend support to services and facilities and promote the Plan’s sustainable objectives. As part of this methodology, the candidate site submission form seeks to guide promoters of land to submit this information.

**Question 1 - Is the site within, immediately adjoining, or closely linked to an identified settlement in the adopted LDP? If so, please identify the settlement from the drop down list.**



The development limits as defined within the LDP should be used for this exercise. Sites immediately adjoining the settlements are defined as those which have a direct link to the existing development limits. Sites situated outside the development limits of any settlement and which are divorced from and unrelated to any settlement will not be taken forward to the next stage of the sieving process.



For sites which are divorced from the settlement, but provide a physical or environmental character / visual link to the settlement may be accepted in exceptional circumstances. Candidate site submissions divorced from settlements must provide exceptional reasons for the site to be brought forward.

**Question 2 – What is the current use of the site?**



The candidate site submission should identify the current land use of the site. (The questionnaire offers a drop down menu of land uses.)

**Question 3 – What is the proposed use of the site?**

- ⓘ The candidate site submission should identify the current proposed use of the site. (The questionnaire offers a drop down menu of land uses.)

**Question 4 - Is the proposal for the site to be a housing allocation or an amendment to the development limits to support small site development?**

- ⓘ Please identify the anticipated number of homes proposed for the site. This will allow the Council to understand the scale of development you are wishing to propose and if it constitutes an allocation (5 or more dwellings) or its inclusion within the development limits for less than 5 dwellings.

3.13 (Whilst not placing an arbitrary site size to determine the difference between that considered for a housing allocation or a small site inclusion, submissions of sites should identify the form that the development is looking to take. This will allow the Local Authority to recognise the applicant’s intentions for the site, and to allow the consideration of the development strategy for each settlement.)

3.14 Sites not capable of accommodating 5 or more houses will be appraised as part of the review of development limits and against those general planning principles highlighted within this methodology.

**Question 5 - If the site is to be considered as a housing allocation 5+ units, please specify how the site will be delivered.**

- ⓘ 3.15 The site submissions should, in broad detail specify how and when the site will be delivered.


- Promoters of land will need to provide an indicative layout to show that their site can accommodate 5 or more dwellings. This should include a road access and plot layout.
- Promoters of land should provide a supporting statement to identify the site’s characteristics. Whilst this list is not exhaustive, it should consider factors such as the character of the area, its impact on the amenity of neighbouring uses, accessibility to services and facilities, the topography of the site etc. – all of which would support the inclusion of a site.
- Promoters of land for sites of five or more units should submit a viability statement to understand the marketplace, and the deliverability of the site. The guidance notes sets out the benchmark figures which should be included as part of any viability assessment.
- The submission should also consider the general planning principles considered within the Site Assessment Methodology.
- Promoters of land of land should include a supporting statement which identifies the site’s potential infrastructure connections to the wider framework.

**Question 6 – For sites of less than 5 dwellings, please specify the number of dwellings considered and how the site will be delivered?**

3.16 The promoters of land should, in broad detail specify how the site will be delivered. The following information should be submitted.

- An indicative layout to show the number of dwellings on the site. This should include the siting of the dwelling(s) within the site
- The submission should also consider the general planning principles considered within the Site Assessment Methodology. Promoters of land should provide a supporting statement to identify the site's characteristics and any pertinent information such as topography, boundary treatments, ecology, access etc.
- Promoters of land of land should include a supporting statement which identifies the site's potential infrastructure connections to the wider framework e.g. sewerage and water connections.

**Question 7 - Is the site located within a flood risk zone as identified in the TAN 15 Development Advice Maps? (Link to NRW Flood Maps)**

 3.17 In the first instance, the Council will not consider any highly vulnerable development sites which fall within C1 and C2 flood risk zones as delineated by TAN 15 flood maps.

3.18 If a site is located within a flood risk zone, it will be a matter for the landowner to provide the appropriate evidence to NRW to demonstrate to their satisfaction that the site is not subject to the identified flood risk. The Council will only consider these sites which have as a result of the evidence provided been omitted from the flood risk zones as delineated with the TAN15 Development Advice Maps. To be considered, these sites will need to be omitted from the flood maps in advance of the preparation of the Deposit LDP.

**FURTHER ANALYSIS AND CONSIDERATIONS**

3.19 The determination of a development proposal will be supplemented by a wider appreciation of planning policy, including general planning principles. These include those relating to ribbon development, back land and tandem development for example.

3.20 Such general planning principles can often be qualitative issues and will be considered as part of a site's appraisal. These will be considered based on the site's individual characteristics, its impact on the character of the area, in addition to its location within the settlement. Other site constraints which may impact upon the site selection process, or indeed the sites deliverability will be considered as part of the selection process. These may include issues of land stability, mineral safeguarding, mineral buffer zones, agricultural land quality and sites of cultural importance.

3.21 Where appropriate, the Council may request further information from promoters of land.

3.22 As with the Strategic Sites, this assessment may require additional information to be provided by internal departments such as drainage, highways and education as well as

external consultation with statutory agencies and organisations where appropriate (see Technical Liaison below).

### **CONSIDERATION OF NON-RESIDENTIAL SITES**

3.23 The allocation of non-residential sites submitted as part of the candidate site methodology will be considered against the planning principles identified within the preceding paragraphs. In addition, reference will need to be drawn to any evidential documents and topical background papers which identify the requirements of such land uses.

### **TECHNICAL LIAISON**

3.24 The Council will undertake liaison with technical and other officers of the Authority and external parties (incl. Natural Resources Wales, Dwr Cymru Welsh Water and the Dyfed Archaeological Trust) to assist and contribute to the plan-making process. This will assist in the screening or consideration of potential sites for inclusion, or otherwise within the LDP.

## **PHASE 2 SA/SEA (and potentially HRA) APPRAISAL**

3.25 In relation to the Deposit LDP stage, regard will be required to the SA/SEA. The Council's SA/SEA framework will be established by this stage. The Council will ensure that its proposals (including sites) as set out within the Deposit LDP will be subject to review against the SA-SEA framework. Subsequent iterations of this methodology will identify further detail in relation to process and its requirements.

3.26 In relation to the HRA, it will be matter for the Council to produce a Plan that will have no significant effect (alone and in-combination) on the European Sites resource. In this regard, the Council will ensure that its proposals (including sites) as set out within the Deposit LDP will be subject to review against the HRA Report (should the initial pre deposit Screening fail to conclude that there is no potential effect).

### **Further Information**

3.27 For further assistance on the Site Assessment Methodology process or the LDP process in general please see our website (see links to Planning and Policy) or email [forward.planning@carmarthenshire.gov.uk](mailto:forward.planning@carmarthenshire.gov.uk) or contact the Forward Planning Section on 01267 228818.

## APPENDIX 1 - ASSESSMENT OF STRATEGIC SITES

### 4. Introduction

4.1 This appendix will iteratively evolve as the pre-deposit Preferred Strategy develops. At this stage, it will be difficult to go into significant detail given that the Preferred Strategy has yet to be compiled. The appendix will be updated to reflect the context of the Preferred Strategy in due course. At this stage (January 2018) this appendix sets out some of those thematic considerations and corporate priorities which may inform future deliberations and Plan making.

4.2 The Swansea Bay City Deal sets out a transformational approach to how the region will deliver the scale and nature of investment needed to support the area's plans for growth. Whilst the County will benefit from all of the City Deal proposals, the following projects are being specifically lead by Carmarthenshire:

- Life Science and Wellbeing Village - Llanelli;
- Skills and Talent initiative and;
- Creative Digital Cluster – Yr Egin – Carmarthen.

4.3 The City Deal will invest £1.3bn into the Swansea Bay City Region. The Deal consists of £241m of central government funding to be split between the two governments. Some £360m of other public sector funding and £673m of private sector contributions will make up the total investment package.

4.4 At a local level, the announcement of Transformations: A Strategic Regeneration Plan for Carmarthenshire – 2015-2030 by Cllr Emlyn Dole, Leader of Carmarthenshire County Council, provides a 'game changing' opportunity to capture opportunities for growth and investment. It aims to boost the local economy and create 5,000 jobs across the County by 2030.

4.5 In noting the above thematic and corporate context, the following seeks to set some parameters to inform a site's potential strategic contribution:

#### 1. Is the Site Strategic?

4.6 The Council will consider sites which are considered appropriate as being of potential strategic significance to the LDP. Such considerations may include the scale and nature of development (whether individual or a number of related sites with cumulative importance), its location, and proposed use.

#### 2. Strategic Consideration - Would development of the site be essential to the implementation of the planning and regeneration proposals of the Council and meet the strategic, sustainable objectives of the Strategy?

4.7 Although specifying a size limit will be too prescriptive, it is likely that strategic sites will have significant impacts and support the implementation of the Plan.

4.8 The identification of strategic sites is subject to analysis as part of the preparation of the Preferred Strategy.

4.9 Further analysis of a Strategic Site will be carried out in accordance with the provisions set out within Site Assessment Methodology, with the following aspects being notable considerations:

- **Environmental impact** – Opportunity for an initial review against the emerging SA/SEA framework and initial HRA screening;
- **Physical site constraints** – Is the site located within a flood risk zone as identified in the TAN 15 Development Advice Maps?
- **Infrastructure issues** – Are there any infrastructure capacity issues that cannot be mitigated against?
- **Site deliverability** – is the site likely to be developed during the revised LDP period?
- **Appraisal in respect of LDP Strategic Objectives**

4.10 Other site constraints which may impact upon the site selection, or indeed the sites deliverability, will be considered as part of the selection process. These may include issues of land stability, mineral safeguarding, buffer zones, agricultural land quality and sites of cultural importance.

4.11 Additional information may be sought on these strategic sites, including information from other Council departments, infrastructure and utility companies and also developers and landowners to assist in the assessment process, particularly in identifying the sites' deliverability.

4.12 The contribution of a strategic site in terms of providing opportunities for higher building standards represents an important consideration. Policies or provision informing the application of standards (including the potential for master planning / development briefs) will be developed. Such policies or provisions will be utilised to inform the identification of such potential and ensure that its viability and deliverability is duly considered.

4.13 In certain instances, sites of a strategic nature might be located outside of settlements in the open countryside. In such cases the scale and nature of the proposal should be assessed in respect of its appropriateness to the location. Proposals that might have a positive strategic impact, for example in terms of raising the prosperity of the area through employment and inward investment, would be considered in exceptional circumstances. These proposed sites will need to be thoroughly assessed against national and local planning policies. Such sites would not however be considered as strategic for the purposes of this exercise.

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## EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

### COUNCIL TAX BASE 2018-19

**Purpose:**

For Executive Board to consider the Tax Base calculations and determine the Tax Base in respect of the financial year 2018-19

**Recommendations / key decisions required:**

It is recommended that, Executive Board:

1. Approves the Council Tax Base calculations for the financial year 2018-19, within the report (Appendix A)
2. Confirms a Council Tax Base of 72,153.24 in respect of the County Council area and
3. Confirms the relevant tax bases for the individual community and town council areas, as shown in Table 2.

**Reasons:**

1. The County Council is required each year, to determine its Council Tax Base, and the Council Tax Base of each community within its area, for the purpose of setting the level of Council Tax for the forthcoming financial year.
2. The attached Council Tax Base calculation has been undertaken in accordance with the established process.
3. Council on 8<sup>th</sup> December 2004 resolved that calculation of the Council Tax Base be designated as an executive function

Relevant scrutiny committee to be consulted : N/A

Exec Board Decision Required	YES
Council Decision Required	NO

**EXECUTIVE BOARD MEMBER PORTFOLIO HOLDER:** Cllr David Jenkins

Directorate: Corporate Services

Name of Head of Service:

Helen L Pugh  
Report Author:  
John Gravelle

Designation(s):

Head of Revenues &  
Financial Compliance  
Revenue Services Manager

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# EXECUTIVE SUMMARY EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

## COUNCIL TAX BASE – 2018-19

1. The Council must determine annually, its Council Tax Base for the purpose of calculating its Council Tax for the forthcoming financial year.
2. Under the provisions of Section 84 of the Local Government Act 2003, and the Local Authorities Executive Arrangements (Functions and Responsibilities) (Amendment) (Wales) Regulations 2004, the annual calculation has been delegated to Executive Board.
3. The Council Tax Base of an area is a measure of its tax-raising capacity, expressed in terms of the number of Band D equivalent dwellings. In simple terms, net spending not met by government grants is divided by the Tax Base to give the amount of Council Tax for a dwelling in Band D. The Tax Base is also used by the Welsh Assembly Government in its revenue settlement calculations.
4. The Tax Base calculation takes into account exemptions, reductions for disabilities and other discounts, together with anticipated changes i.e. new dwellings and appeals. The calculation also reflects the difference in the level of charge across the Valuation Bands.
5. A collection rate is then applied to give the net Tax Base expressed in terms of Band D equivalent dwellings. The collection rate applied for 2018-19 is 97.5% (remaining unchanged from the 2017-18 calculation).
6. The County Council must also calculate the individual Tax Bases for all the Town and Community Councils within the County, using the same basis of calculation and collection rate. The calculations must also ensure that the sum of the individual Tax Base figures for each part of the Authority's area is equal to the Council's Tax Base for the whole of the area.
7. The calculation of the Tax Base for the County Council for 2018-19 is shown in Table 1a & summarised in Table 1b.

The calculation for individual Town and Community Council areas is summarised in Table 2 and detailed in Appendix A.

8. It is therefore, recommended that for the financial year 2018-19, Executive Board:
  - a) agrees the calculations within Tables 1a & 1b
  - b) approves a Council Tax Base of **72,153.24**  
and
  - c) approves the individual Tax Bases for the Town and Community Council areas within the County, as listed in Table 2 and detailed in Appendix A

DETAILED REPORT ATTACHED?

Summary Tables with detailed calculation tables in Appendix A

## IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report :

Signed: Chris Moore.....Director of Corporate Services

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
<b>NONE</b>	<b>NONE</b>	<b>YES</b>	<b>NONE</b>	<b>NONE</b>	<b>NONE</b>	<b>NONE</b>

### 1. Finance

The tax base calculation expressed in terms of Band D equivalent shows an increase of approximately 0.8% for 2018-19 compared with 2017-18. This is broadly in line with the increases seen in recent years.

The collection rate of 97.5% which has been applied since 2014-15 has been retained for 2018-19. (The rate applied for the years prior to 2014-15 was 96%)

## CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: Chris Moore.....Director of Corporate Services

1. Scrutiny Committee - N/A

2. Local Member(s) - N/A

3. Community / Town Council - N/A

4. Relevant Partners - N/A

5. Staff Side Representatives and other Organisations - N/A

**Section 100D Local Government Act, 1972 – Access to Information**

**List of Background Papers used in the preparation of this report:**

THERE ARE NONE

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**COUNCIL TAX BASE CALCULATION – 2018-19**

**Table 1.a**

Ref.	Total - Whole Authority	A-	A	B	C	D	E	F	G	H	I	TOTAL
a	Chargeable Dwellings		8664	23403	17560	13680	12621	6228	2081	289	72	84,598
b	Add - Adjustments for year	0	1	19	77	134	27	7	1	1	0	267
c	Disability reductions		41	216	232	210	241	126	45	14	19	1,144
d	Net Chargeable Dwellings	41	8840	23438	17615	13845	12533	6154	2051	295	53	84865
f	Dwellings with 1 discount	23	5140	9927	6074	4027	2891	1092	257	36	2	29469
g	Dwellings with 2 discounts	0	513	831	676	488	346	127	53	35	11	3080
h	Total Discounts @ 25%	23	6166	11589	7426	5003	3583	1346	363	106	24	35629
i	Total Discounted Dwellings	35.25	7,298.50	20,540.75	15,758.50	12,594.25	11,637.25	5,817.50	1,960.25	268.50	47.00	75957.75
j	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
	Band D Equivalent	19.58	4,865.67	15,976.14	14,007.56	12,594.25	14,223.31	8,403.06	3,267.08	537.00	109.67	74003.32
TAX BASE AT 97.5% COLLECTION RATE												72153.24
Adjustment for Class O Dwellings												0
TAX BASE 2018-19												72153.24

Key

- a The number of dwellings shown in the Valuation List, less exempt dwellings
- b The estimated movement during the year arising from new properties and other movements in Valuation Bands due to appeals etc.
- c Dwellings which have a (particular) feature required for a disabled resident and therefore are charged at the next lower band
- d Dwellings subject to Council Tax in the specified Valuation Band
- f 25% discount applies where only one adult is counted as resident (certain residents are not counted e.g students & mentally impaired)
- g Vacant dwellings and dwellings where none of the residents are counted, attract 50% discount
- h The total number of discounts @25% i.e.: f + (gx2)
- i The total net chargeable dwellings (line d) less a deduction to reflect the discounts shown in line h
- j The adjustment ratio due to the variations in charge, e.g. Band B properties are charged at 7/9ths of Band D.

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**COUNCIL TAX BASE CALCULATION 2018-19**

**Table 1.b**

A	Band D Equivalent Dwellings	74003.32
B	Estimated Collection Rate	97.5%
	A x B	72,153.24
	Class O Exempt	0
	<b>COUNCIL TAX BASE 2018-19</b>	72,153.24

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**TABLE 2****Tax Base Community Totals 2018-19**

<b>COMMUNITY</b>		<b>COMMUNITY</b>	
<b>(Col. 1)</b>	<b>2018/19</b>	<b>(Col. 1)</b>	<b>2018/19</b>
ABERGWILI	722.09	PENCARREG	530.26
ABERNANT	126.88	NEWCASTLE EMLYN TOWN	453.52
BRONWYDD	271.97	CARMARTHEN TOWN	5422.37
CILYMAENLLWYD	335.01		
CYNWYL ELFED	451.46	AMMANFORD TOWN	1911.79
EGLWYS GYMYN	181.85	CWMAMMAN TOWN	1542.82
GORSLAS	1922.83	LLANDEILO TOWN	783.82
HENLLAN FALLTEG	219.43	LLANDOVERY TOWN	777.70
LAUGHARNE TOWN	552.75	BETTWS	876.61
LLANARTHNE	393.84	CILYCWM	223.21
LLANBOIDY	432.32	CYNWYL GAEO	434.45
LLANDDAROG	541.73	DYFFRYN CENNEN	515.47
LLANDDOWROR & LLANMILOE	338.06	LLANDDEUSANT	126.98
LLANDYFAELOG	610.50	LLANDYBIE	4260.77
LLANGAIN	286.10	LLANEGWAD	695.25
LLANGYNDEYRN	1393.33	LLANFAIR AR Y BRYN	265.60
LLANGUNNOR	1142.79	LLANFIHANGEL ABERBYTHYCH	573.03
LLANGYNIN	132.28	LLANFYNYDD	228.61
LLANGYNOG	230.04	LLANGADOG	615.90
LLANLLAWDDOG	323.75	LLANGATHEN	264.61
LLANPUMPSAINT	327.47	LLANSADWRN	224.01
LLANSTEFFAN & LLANYBRI	553.14	LLANSAWEL	197.16
LLANWINIO	198.93	LLANWRDA	234.41
MEIDRIM	260.90	MANORDEILO & SALEM	772.79
NEWCHURCH & MERTHYR	308.15	MYDDFAI	178.76
PENDINE	156.94	QUARTER BACH	940.64
ST CLEAR'S TOWN	1304.06	TALLEY	244.59
ST ISHMAEL	761.65		
TRELECH	322.18	LLANELLI TOWN	8734.29
WHITLAND	703.21	LLANELLI RURAL	8031.32
CENARTH	525.84	PEMBREY & BURRY PORT TOWN	3189.81
LLANFIHANGEL-AR-ARTH	897.99	KIDWELLY TOWN	1365.51
LLANFIHANGEL RHOS-Y-CORN	216.52	LLANEDI	2182.84
LLANGELER	1480.81	LLANGENNECH	1947.92
LLANLLWNI	316.62	LLANNON	1920.59
LLANYBYDDER	583.68	PONTYBEREM	1003.87
LLANYCRWYS	105.63	TRIMSARAN	849.23
	19632.73		52520.51
		<b>TOTAL</b>	72153.24

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Tax Base Calculation Tables

**COUNCIL TAX BASE CALCULATION TABLES - 2018-19**

**APPENDIX A**

Ref.	201 - AMMANFORD TOWN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	2	445	680	785	331	153	80	29	0	1	2506
I	No. of Discounts at 25%	2	351	324	331	126	46	27	6	0	2	1215
J	Adjustments for year	0.00	0.00	0.00	5.00	2.00	0.00	0.00	0.00	0.00	0.00	7
H-(I*E)+J	Total Discounted Dwellings	1.5	357.25	599	707.25	301.5	141.5	73.25	27.5	0	0.5	2209.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0.83	238.17	465.89	628.67	301.5	172.94	105.81	45.83	0	1.17	1960.81
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											1911.79
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											1911.79

Ref.	202 - CWMAMMAN TOWN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	3	448	651	395	352	131	63	7	0	0	2050
I	No. of Discounts at 25%	1	326	308	152	120	38	16	1	0	0	962
J	Adjustments for year	0.00	0.00	0.00	2.00	4.00	0.00	0.00	0.00	0.00	0.00	6
H-(I*E)+J	Total Discounted Dwellings	2.75	366.5	574	359	326	121.5	59	6.75	0	0	1815.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	1.53	244.33	446.44	319.11	326	148.5	85.22	11.25	0	0	1582.38
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											1542.82
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											1542.82

Ref.	203 - LLANDEILO TOWN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	184	170	233	154	135	74	19	2	0	971
I	No. of Discounts at 25%	0	167	89	139	68	60	20	8	1	0	552
J	Adjustments for year	0.00	0.00	0.00	2.00	1.00	0.00	0.00	0.00	0.00	0.00	3
H-(I*E)+J	Total Discounted Dwellings	0	142.25	147.75	200.25	138	120	69	17	1.75	0	836
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	94.83	114.92	178	138	146.67	99.67	28.33	3.5	0	803.92
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											783.82
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											783.82

Tax Base Calculation Tables

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**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	204 - LLANDOVERY TOWN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	109	216	294	147	109	64	11	5	0	955
I	No. of Discounts at 25%	0	66	147	150	59	43	12	0	6	0	483
J	Adjustments for year	0.00	0.00	0.00	2.00	1.00	0.00	0.00	0.00	0.00	0.00	3
H-(I*E)+J	Total Discounted Dwellings	0	92.5	179.25	258.5	133.25	98.25	61	11	3.5	0	837.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	61.67	139.42	229.78	133.25	120.08	88.11	18.33	7	0	797.64
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											777.70
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											777.70

Ref.	205 - BETTWS	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	2	167	187	148	201	230	57	11	4	0	1007
I	No. of Discounts at 25%	0	93	89	62	63	54	5	2	4	0	372
J	Adjustments for year	0.00	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	3
H-(I*E)+J	Total Discounted Dwellings	2	144.75	165.75	133.5	185.25	216.5	55.75	10.5	3	0	917
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	1.11	96.5	128.92	118.67	185.25	264.61	80.53	17.5	6	0	899.09
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											876.61
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											876.61

Ref.	206 - CILYCWM	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	5	5	50	67	67	27	4	0	0	225
I	No. of Discounts at 25%	0	1	3	19	18	15	8	3	0	0	67
J	Adjustments for year	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	1
H-(I*E)+J	Total Discounted Dwellings	0	4.75	4.25	46.25	62.5	63.25	25	3.25	0	0	209.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	3.17	3.31	41.11	62.5	77.31	36.11	5.42	0	0	228.93
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											223.21
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											223.21

Tax Base Calculation Tables

**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	207 - CYNWYL GAEO	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	11	37	61	145	131	49	7	0	2	443
I	No. of Discounts at 25%	0	7	26	26	45	35	13	0	0	0	152
J	Adjustments for year	0.00	0.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	0	9.25	31.5	55.5	133.75	122.25	45.75	7	0	2	407
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	6.17	24.5	49.33	133.75	149.42	66.08	11.67	0	4.67	445.59
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											434.45
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											434.45

Ref.	208 - DYFFRYN CENNEN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	24	64	102	82	126	78	35	12	0	523
I	No. of Discounts at 25%	0	28	44	58	31	38	22	8	8	0	237
J	Adjustments for year	0.00	0.00	0.00	0.00	2.00	0.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	0	17	53	87.5	76.25	116.5	72.5	33	10	0	465.75
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	11.33	41.22	77.78	76.25	142.39	104.72	55	20	0	528.69
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											515.47
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											515.47

Ref.	209 - LLANDDEUSANT	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	3	1	10	41	43	21	0	1	0	120
I	No. of Discounts at 25%	0	1	1	3	14	10	2	0	0	0	31
J	Adjustments for year	0.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	1
H-(I*E)+J	Total Discounted Dwellings	0	2.75	0.75	9.25	38.5	40.5	20.5	0	1	0	113.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	1.83	0.58	8.22	38.5	49.5	29.61	0	2	0	130.24
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											126.98
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											126.98

Tax Base Calculation Tables

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**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	210 - LLANDYBIE	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	6	615	1151	1231	872	694	337	100	11	1	5018
I	No. of Discounts at 25%	5	418	547	507	271	169	72	17	8	0	2014
J	Adjustments for year	0.00	0.00	1.00	5.00	6.00	2.00	1.00	0.00	0.00	0.00	15
H-(I*E)+J	Total Discounted Dwellings	4.75	510.5	1015.25	1109.25	810.25	653.75	320	95.75	9	1	4529.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	2.64	340.33	789.64	986	810.25	799.03	462.22	159.58	18	2.33	4370.02
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											4260.77
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											4260.77

Ref.	211 - LLANEGWAD	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0.0	40.0	37.0	61.0	99.0	179.0	160.0	59.0	7.0	2.0	644
I	No. of Discounts at 25%	0	22	19	36	47	61	42	8	0	0	235
J	Adjustments for year	0.00	0.00	1.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	0	34.5	33.25	52	88.25	163.75	149.5	57	7	2	587.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	23	25.86	46.22	88.25	200.14	215.94	95	14	4.67	713.08
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											695.25
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											695.25

Ref.	212 - LLANFAIR AR Y BRYN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	11	17	59	63	86	26	5	1	1	269
I	No. of Discounts at 25%	0	4	11	29	17	20	7	0	0	0	88
J	Adjustments for year	0.00	0.00	0.00	0.00	2.00	1.00	0.00	0.00	0.00	0.00	3
H-(I*E)+J	Total Discounted Dwellings	0	10	14.25	51.75	60.75	82	24.25	5	1	1	250
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	6.67	11.08	46	60.75	100.22	35.03	8.33	2	2.33	272.41
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											265.60
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											265.60

Tax Base Calculation Tables

**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	213 LLANFIHANGEL ABERBYTHYCH	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	23	77	86	109	142	91	36	4	0	568
I	No. of Discounts at 25%	0	12	32	49	32	36	13	7	4	0	185
J	Adjustments for year	0.00	0.00	1.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	0	20	70	73.75	102	133	87.75	34.25	3	0	523.75
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	13.33	54.44	65.56	102	162.56	126.75	57.08	6	0	587.72
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											573.03
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											573.03

Ref.	214 - LLANFYNYDD	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	17	3	30	55	62	43	9	1	1	221
I	No. of Discounts at 25%	0	6	5	12	22	17	10	3	0	0	75
J	Adjustments for year	0.00	0.00	0.00	1.00	0.00	1.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	0	15.5	1.75	28	49.5	58.75	40.5	8.25	1	1	204.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	10.33	1.36	24.89	49.5	71.81	58.5	13.75	2	2.33	234.47
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											228.61
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											228.61

Ref.	215 - LLANGADOG	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	21	27	129	112	179	109	23	7	0	607
I	No. of Discounts at 25%	0	14	17	54	53	63	33	3	2	0	239
J	Adjustments for year	0.00	0.00	0.00	2.00	4.00	0.00	0.00	0.00	0.00	0.00	6
H-(I*E)+J	Total Discounted Dwellings	0	17.5	22.75	117.5	102.75	163.25	100.75	22.25	6.5	0	553.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	11.67	17.69	104.44	102.75	199.53	145.53	37.08	13	0	631.69
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											615.90
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											615.90

Tax Base Calculation Tables

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**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	216 - LLANGATHEN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	14	9	20	24	69	48	33	8	3	228
I	No. of Discounts at 25%	0	5	6	5	8	20	12	8	1	0	65
J	Adjustments for year	0.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	1
H-(I*E)+J	Total Discounted Dwellings	0	12.75	7.5	18.75	23	64	45	31	7.75	3	212.75
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	8.5	5.83	16.67	23	78.22	65	51.67	15.5	7	271.39
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											264.61
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											264.61

Ref.	217 - LLANSADWRN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	18	4	22	52	55	48	10	2	0	211
I	No. of Discounts at 25%	0	5	3	11	13	14	10	1	1	0	58
J	Adjustments for year	0.00	0.00	1.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	0	16.75	4.25	19.25	49.75	51.5	45.5	9.75	1.75	0	198.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	11.17	3.31	17.11	49.75	62.94	65.72	16.25	3.5	0	229.75
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											224.01
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											224.01

Ref.	218 - LLANSAWEL	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	7	29	41	46	53	23	8	1	0	208
I	No. of Discounts at 25%	0	5	16	20	26	13	10	1	0	0	91
J	Adjustments for year	0.00	0.00	0.00	1.00	0.00	1.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	0	5.75	25	37	39.5	50.75	20.5	7.75	1	0	187.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	3.83	19.44	32.89	39.5	62.03	29.61	12.92	2	0	202.22
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											197.16
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											197.16



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**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	219 - LLANWRDA	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	9	25	21	52	63	34	15	6	0	225
I	No. of Discounts at 25%	0	6	10	8	21	27	4	1	1	0	78
J	Adjustments for year	0.00	0.00	1.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	0	7.5	23.5	19	47.75	56.25	33	14.75	5.75	0	207.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	5	18.28	16.89	47.75	68.75	47.67	24.58	11.5	0	240.42
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											234.41
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											234.41

Ref.	220 - MANORDEILO & SALEM	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	19	22	99	137	181	180	57	8	3	706
I	No. of Discounts at 25%	0	11	12	51	61	58	34	9	4	0	240
J	Adjustments for year	0.00	0.00	0.00	1.00	3.00	1.00	0.00	0.00	0.00	0.00	5
H-(I*E)+J	Total Discounted Dwellings	0	16.25	19	87.25	124.75	167.5	171.5	54.75	7	3	651
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	10.83	14.78	77.56	124.75	204.72	247.72	91.25	14	7	792.61
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											772.79
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											772.79

Ref.	221 - MYDDFAI	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	6	9	24	46	51	28	8	0	1	173
I	No. of Discounts at 25%	0	2	9	10	7	19	6	1	0	0	54
J	Adjustments for year	0.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	1
H-(I*E)+J	Total Discounted Dwellings	0	5.5	6.75	21.5	45.25	46.25	26.5	7.75	0	1	160.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	3.67	5.25	19.11	45.25	56.53	38.28	12.92	0	2.33	183.34
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											178.76
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											178.76

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**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	222 - QUARTER BACH	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	5	477	448	228	93	65	19	1	1	0	1337
I	No. of Discounts at 25%	2	254	217	85	21	12	3	0	0	0	594
J	Adjustments for year	0.00	0.00	0.00	2.00	0.00	1.00	0.00	0.00	0.00	0.00	3
H-(I*E)+J	Total Discounted Dwellings	4.5	413.5	393.75	208.75	87.75	63	18.25	1	1	0	1191.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	2.5	275.67	306.25	185.56	87.75	77	26.36	1.67	2	0	964.76
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											940.64
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											940.64

Ref.	223 - TALLEY	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	5	23	22	47	81	37	15	4	0	234
I	No. of Discounts at 25%	0	3	15	17	18	20	9	5	2	0	89
J	Adjustments for year	0.00	0.00	1.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	0	4.25	20.25	17.75	43.5	76	34.75	13.75	3.5	0	213.75
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	2.83	15.75	15.78	43.5	92.89	50.19	22.92	7	0	250.86
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											244.59
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											244.59

Ref.	224 - LLANELLI TOWN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	4	1476	5813	2397	1208	519	269	102	40	9	11837
I	No. of Discounts at 25%	3	1234	2826	1017	467	170	62	26	13	11	5829
J	Adjustments for year	0.00	0.00	2.0	3.0	8.0	2.0	0.0	0.00	0.00	0.00	15
H-(I*E)+J	Total Discounted Dwellings	3.25	1167.5	5108.5	2145.75	1099.25	478.5	253.5	95.5	36.75	6.25	10394.75
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	1.81	778.33	3973.28	1907.33	1099.25	584.83	366.17	159.17	73.5	14.58	8958.23
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											8734.29
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											8734.29

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**APPENDIX A**

Ref.	225 - LLANELLI RURAL	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	7	697	4057	2419	1346	843	384	198	24	9	9984
I	No. of Discounts at 25%	4	468	1921	972	434	217	69	24	5	8	4122
J	Adjustments for year	0.00	0.00	0.0	4.0	12.0	2.0	0.0	0.00	0.00	0.00	18
H-(I*E)+J	Total Discounted Dwellings	6	580	3576.75	2180	1249.5	790.75	366.75	192	22.75	7	8971.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	3.33	386.67	2781.92	1937.78	1249.5	966.47	529.75	320	45.5	16.33	8237.25
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											8031.32
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											8031.32

Ref.	226 - PEMBREY & BURRY PT. TOWN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	2	495	1369	812	657	356	198	65	13	2	3969
I	No. of Discounts at 25%	2	325	641	318	231	112	42	12	7	0	1690
J	Adjustments for year	0.00	0.00	0.0	0.0	1.0	1.0	0.0	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	1.5	413.75	1208.75	732.5	600.25	329	187.5	62	11.25	2	3548.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0.83	275.83	940.14	651.11	600.25	402.11	270.83	103.33	22.5	4.67	3271.60
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											3189.81
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											3189.81

Ref.	227 - KIDWELLY TOWN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	2	208	608	276	202	216	110	33	7	0	1662
I	No. of Discounts at 25%	0	149	302	107	74	55	25	11	0	0	723
J	Adjustments for year	0.00	0.00	1.0	1.0	2.0	1.0	0.0	0.00	0.00	0.00	5
H-(I*E)+J	Total Discounted Dwellings	2	170.75	533.5	250.25	185.5	203.25	103.75	30.25	7	0	1486.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	1.11	113.83	414.94	222.44	185.5	248.42	149.86	50.42	14	0	1400.52
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											1365.51
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											1365.51

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**APPENDIX A**

Ref.	228 - LLANEDI		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	134	855	619	337	279	168	116	12	3	2523
I	No. of Discounts at 25%		0	94	410	225	107	69	30	18	2	3	958
J	Adjustments for year		0.00	0.00	1.0	2.0	1.0	0.0	0.0	0.00	0.00	0.00	4
H-(I*E)+J	Total Discounted Dwellings		0	110.5	753.5	564.75	311.25	261.75	160.5	111.5	11.5	2.25	2287.5
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	73.67	586.06	502	311.25	319.92	231.83	185.83	23	5.25	2238.81
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												2182.84
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												2182.84

Ref.	229 - LLANGENNECH		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	110	579	618	391	349	134	44	11	1	2237
I	No. of Discounts at 25%		0	76	283	245	149	73	24	4	4	0	858
J	Adjustments for year		0.00	0.00	0.0	3.0	3.0	2.0	0.00	0.00	1.00	0.00	9
H-(I*E)+J	Total Discounted Dwellings		0	91	508.25	559.75	356.75	332.75	128	43	11	1	2031.50
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	60.67	395.31	497.56	356.75	406.69	184.89	71.67	22	2.33	1997.87
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												1947.92
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												1947.92

Ref.	230 - LLANNON		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	211	845	480	360	272	116	33	7	0	2324
I	No. of Discounts at 25%		0	161	339	179	109	61	18	5	7	0	879
J	Adjustments for year		0.00	0.00	1.0	2.0	3.0	1.0	0.0	0.00	0.00	0.00	7.00
H-(I*E)+J	Total Discounted Dwellings		0	170.75	761.25	437.25	335.75	257.75	111.5	31.75	5.25	0	2111.25
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	113.83	592.08	388.67	335.75	315.03	161.06	52.92	10.5	0	1969.84
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												1920.59
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												1920.59

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**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	231 - PONTYBEREM		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		1	167	460	248	191	130	54	8	1	0	1260
I	No. of Discounts at 25%		0	111	213	86	55	43	11	2	0	0	521
J	Adjustments for year		0.0	0.0	1.00	2.0	3.0	0.0	1.00	0.00	0.00	0	7
H-(I*E)+J	Total Discounted Dwellings		1	139.25	407.75	228.5	180.25	119.25	52.25	7.5	1	0	1136.75
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0.56	92.83	317.14	203.11	180.25	145.75	75.47	12.5	2	0	1029.61
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												1003.87
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												1003.87

Ref.	232 - TRIMSARAN		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		3	338	342	150	139	90	49	9	0	0	1120
I	No. of Discounts at 25%		2	171	148	60	51	20	9	4	0	0	465
J	Adjustments for year		0.0	0.0	1.0	2.0	2.0	0.0	0.0	0.00	0.0	0.0	5
H-(I*E)+J	Total Discounted Dwellings		2.5	295.25	306	137	128.25	85	46.75	8	0	0	1008.75
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		1.39	196.83	238	121.78	128.25	103.89	67.53	13.33	0	0	871
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												849.23
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												849.23

Ref.	233 - ABERGWILI		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	12	67	109	138	147	163	52	3	0	691
I	No. of Discounts at 25%		0	9	41	41	59	46	33	11	1	0	241
J	Adjustments for year		0.0	0.0	0.0	0.0	1.0	1.0	0.0	0.0	0.0	0.0	2
H-(I*E)+J	Total Discounted Dwellings		0	9.75	56.75	98.75	124.25	136.5	154.75	49.25	2.75	0	632.75
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	6.5	44.14	87.78	124.25	166.83	223.53	82.08	5.5	0	740.61
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												722.09
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												722.09

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**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	234 - ABERNANT	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	5	7	13	44	41	15	2	1	0	128
I	No. of Discounts at 25%	0	5	5	5	21	11	4	0	0	0	51
J	Adjustments for year	0.0	0.0	1.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	2
H-(I*E)+J	Total Discounted Dwellings	0	3.75	6.75	12.75	38.75	38.25	14	2	1	0	117.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	2.5	5.25	11.33	38.75	46.75	20.22	3.33	2	0	130.13
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											126.88
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											126.88

Ref.	235 - BRONWYDD	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	1	6	12	32	55	87	36	20	4	1	254
I	No. of Discounts at 25%	1	6	11	19	17	22	2	5	0	0	83
J	Adjustments for year	0.0	0.0	0.00	1.00	0.00	0.00	0.00	0.0	0.0	0.0	1
H-(I*E)+J	Total Discounted Dwellings	0.75	4.5	9.25	28.25	50.75	81.5	35.5	18.75	4	1	234.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0.42	3	7.19	25.11	50.75	99.61	51.28	31.25	8	2.33	278.94
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											271.97
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											271.97

Ref.	236 - CILYMAENLLWYD	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	15	19	28	82	140	45	3	1	0	333
I	No. of Discounts at 25%	0	10	12	12	37	40	10	1	0	0	122
J	Adjustments for year	0.0	0.0	0.00	0.00	1.00	0.00	0.00	0.00	0.0	0.0	1
H-(I*E)+J	Total Discounted Dwellings	0	12.5	16	25	73.75	130	42.5	2.75	1	0	303.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	8.33	12.44	22.22	73.75	158.89	61.39	4.58	2	0	343.6
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											335.01
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											335.01

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**APPENDIX A**

Ref.	238 - CYNWYL ELFED		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	15	31	59	99	173	46	17	0	0	440
I	No. of Discounts at 25%		0	8	20	22	20	39	8	2	0	0	119
J	Adjustments for year		0.00	0.00	0.00	0.00	2.00	0.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings		0	13	26	53.5	96	163.25	44	16.5	0	0	412.25
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	8.67	20.22	47.56	96	199.53	63.56	27.5	0	0	463.04
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												451.46
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												451.46

Ref.	239 - EGLWYS GYMYN		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	15	10	18	48	56	30	6	0	1	184
I	No. of Discounts at 25%		0	14	6	7	22	18	8	1	0	0	76
J	Adjustments for year		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
H-(I*E)+J	Total Discounted Dwellings		0	11.5	8.5	16.25	42.5	51.5	28	5.75	0	1	165
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	7.67	6.61	14.44	42.5	62.94	40.44	9.58	0	2.33	186.51
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												181.85
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												181.85

Ref.	240 - GORSLAS		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	39	450	562	428	356	179	74	6	1	2095
I	No. of Discounts at 25%		0	33	242	231	160	95	30	8	4	0	803
J	Adjustments for year		0.00	0.00	0.00	10.00	15.00	2.00	0.00	0.00	0.00	0.00	27
H-(I*E)+J	Total Discounted Dwellings		0	30.75	389.5	514.25	403	334.25	171.5	72	5	1	1921.25
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	20.5	302.94	457.11	403	408.53	247.72	120	10	2.33	1972.13
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												1922.83
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												1922.83

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**APPENDIX A**

Ref.	241 - HENLLAN FALLTEG	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	2	6	24	36	70	40	17	2	0	197
I	No. of Discounts at 25%	0	0	2	7	13	16	10	3	0	0	51
J	Adjustments for year	0.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	1
H-(I*E)+J	Total Discounted Dwellings	0	2	5.5	22.25	33.75	66	37.5	16.25	2	0	185.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	1.33	4.28	19.78	33.75	80.67	54.17	27.08	4	0	225.06
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											219.43
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											219.43

Ref.	242 - LAUGHARNE TOWN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	26	62	149	128	96	70	42	7	0	580
I	No. of Discounts at 25%	0	14	41	68	57	37	23	9	3	0	252
J	Adjustments for year	0.00	0.00	0.00	0.00	3.00	0.00	0.00	0.00	0.00	0.00	3
H-(I*E)+J	Total Discounted Dwellings	0	22.5	51.75	132	116.75	86.75	64.25	39.75	6.25	0	520
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	15	40.25	117.33	116.75	106.03	92.81	66.25	12.5	0	566.92
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											552.75
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											552.75

Ref.	243 - LLANARTHNE	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	5	15	32	63	93	85	46	4	2	345
I	No. of Discounts at 25%	0	5	12	10	24	37	18	5	0	0	111
J	Adjustments for year	0.00	0.00	0.00	0.00	3.00	0.00	0.00	0.00	0.00	0.00	3
H-(I*E)+J	Total Discounted Dwellings	0	3.75	12	29.5	60	83.75	80.5	44.75	4	2	320.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	2.5	9.33	26.22	60	102.36	116.28	74.58	8	4.67	403.94
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											393.84
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											393.84



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**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	244 - LLANBOIDY	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	28	29	49	111	154	47	11	5	0	434
I	No. of Discounts at 25%	0	16	23	24	33	41	11	5	1	0	154
J	Adjustments for year	0.00	0.00	0.00	0.00	3.00	0.00	0.00	0.00	0.00	0.00	3
H-(I*E)+J	Total Discounted Dwellings	0	24	23.25	43	105.75	143.75	44.25	9.75	4.75	0	398.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	16	18.08	38.22	105.75	175.69	63.92	16.25	9.5	0	443.41
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											432.32
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											432.32

Ref.	245 - LLANDDAROG	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	16	47	122	77	147	75	47	1	0	532
I	No. of Discounts at 25%	0	8	33	48	25	45	14	7	0	0	180
J	Adjustments for year	0.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	1
H-(I*E)+J	Total Discounted Dwellings	0	14	38.75	110	71.75	135.75	71.5	45.25	1	0	488
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	9.33	30.14	97.78	71.75	165.92	103.28	75.42	2	0	555.62
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											541.73
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											541.73

Ref.	246 - LLANDDOWROR & LLANMILO	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	17	80	109	58	77	25	11	1	0	378
I	No. of Discounts at 25%	0	17	34	37	31	20	5	2	0	0	146
J	Adjustments for year	0.00	0.00	0.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	0	12.75	71.5	100.75	51.25	72	23.75	10.5	1	0	343.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	8.5	55.61	89.56	51.25	88	34.31	17.5	2	0	346.73
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											338.06
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											338.06

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**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	247 - LLANDYFAELOG		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	19	33	50	142	199	83	41	6	2	575
I	No. of Discounts at 25%		0	9	18	21	55	59	19	8	0	0	189
J	Adjustments for year		0.00	0.00	0.00	1.00	4.00	0.00	0.00	0.00	0.00	0.00	5
H-(I*E)+J	Total Discounted Dwellings		0	16.75	28.5	45.75	132.25	184.25	78.25	39	6	2	532.75
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	11.17	22.17	40.67	132.25	225.19	113.03	65	12	4.67	626.15
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												610.50
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												610.50

Ref.	248 - LLANGAIN		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	5	19	28	30	118	52	9	4	1	266
I	No. of Discounts at 25%		0	5	15	8	8	43	10	2	0	0	91
J	Adjustments for year		0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	1
H-(I*E)+J	Total Discounted Dwellings		0	3.75	15.25	27	28	107.25	49.5	8.5	4	1	244.25
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	2.5	11.86	24	28	131.08	71.5	14.17	8	2.33	293.44
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												286.10
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												286.10

Ref.	249 - LLANGYNDEYRN		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		1	206	336	296	318	345	77	24	2	0	1605
I	No. of Discounts at 25%		1	115	138	131	117	82	9	3	0	0	596
J	Adjustments for year		0.00	0.00	1.00	1.00	3.00	1.00	0.00	0.00	0.00	0.00	6
H-(I*E)+J	Total Discounted Dwellings		0.75	177.25	302.5	264.25	291.75	325.5	74.75	23.25	2	0	1462
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0.42	118.17	235.28	234.89	291.75	397.83	107.97	38.75	4	0	1429.06
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												1393.33
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												1393.33

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Ref.	250 - LLANGUNNOR		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	55	253	110	222	373	129	47	7	0	1196
I	No. of Discounts at 25%		0	50	142	40	95	114	31	5	2	0	479
J	Adjustments for year		0.00	0.00	0.00	0.00	2.00	0.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings		0	42.5	217.5	100	200.25	344.5	121.25	45.75	6.5	0	1078.25
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	28.33	169.17	88.89	200.25	421.06	175.14	76.25	13	0	1172.09
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												1142.79
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												1142.79

Ref.	251 - LLANGYNIN		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	3	7	5	24	57	19	6	0	0	121
I	No. of Discounts at 25%		0	3	4	1	5	10	7	0	0	0	30
J	Adjustments for year		0.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	1
H-(I*E)+J	Total Discounted Dwellings		0	2.25	6	4.75	23.75	54.5	17.25	6	0	0	114.5
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	1.5	4.67	4.22	23.75	66.61	24.92	10	0	0	135.67
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												132.28
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												132.28

Ref.	252 - LLANGYNOG		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	2	14	13	38	86	49	6	1	1	210
I	No. of Discounts at 25%		0	1	8	6	19	17	5	3	0	0	59
J	Adjustments for year		0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
H-(I*E)+J	Total Discounted Dwellings		0	1.75	12	11.5	33.25	81.75	47.75	5.25	1	1	195.25
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	1.17	9.33	10.22	33.25	99.92	68.97	8.75	2	2.33	235.94
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												230.04
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												230.04

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**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	253 - LLANLLAWDDOG	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	6	19	14	63	116	59	15	2	1	295
I	No. of Discounts at 25%	0	8	12	7	21	26	9	2	0	0	85
J	Adjustments for year	0.00	0.00	0.00	0.00	2.00	0.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	0	4	16	12.25	59.75	109.5	56.75	14.5	2	1	275.75
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	2.67	12.44	10.89	59.75	133.83	81.97	24.17	4	2.33	332.05
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											323.75
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											323.75

Ref.	254 - LLANPUMSAINT	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	2	18	36	67	117	52	15	2	0	309
I	No. of Discounts at 25%	0	0	14	18	26	33	10	2	1	0	104
J	Adjustments for year	0.00	0.00	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	3
H-(I*E)+J	Total Discounted Dwellings	0	2	15.5	32.5	61.5	108.75	49.5	14.5	1.75	0	286
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	1.33	12.06	28.89	61.5	132.92	71.5	24.17	3.5	0	335.87
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											327.47
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											327.47

Ref.	255 - LLANSTEFFAN & LLANYBRI	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	115	46	81	77	122	96	36	3	2	578
I	No. of Discounts at 25%	0	18	30	41	37	38	37	5	0	0	206
J	Adjustments for year	0.00	0.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	0	110.5	39.5	71.75	67.75	112.5	86.75	34.75	3	2	528.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	73.67	30.72	63.78	67.75	137.5	125.31	57.92	6	4.67	567.32
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											553.14
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											553.14

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**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	256 - LLANWINIO	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	9	2	26	63	74	20	3	0	0	197
I	No. of Discounts at 25%	0	5	1	14	22	13	1	0	0	0	56
J	Adjustments for year	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
H-(I*E)+J	Total Discounted Dwellings	0	7.75	1.75	22.5	57.5	70.75	19.75	3	0	0	183
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	5.17	1.36	20	57.5	86.47	28.53	5	0	0	204.03
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											198.93
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											198.93

Ref.	257 - MEIDRIM	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	26	12	44	57	83	34	10	0	0	266
I	No. of Discounts at 25%	0	17	6	20	19	25	6	1	0	0	94
J	Adjustments for year	0.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	1
H-(I*E)+J	Total Discounted Dwellings	0	21.75	10.5	39	53.25	76.75	32.5	9.75	0	0	243.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	14.5	8.17	34.67	53.25	93.81	46.94	16.25	0	0	267.59
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											260.90
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											260.90

Ref.	258 - NEWCHURCH & MERTHYR	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	6	39	30	56	102	43	20	2	0	298
I	No. of Discounts at 25%	0	3	20	11	18	28	11	5	0	0	96
J	Adjustments for year	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	0.00	1
H-(I*E)+J	Total Discounted Dwellings	0	5.25	34	28.25	51.5	95	40.25	18.75	2	0	275
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	3.5	26.44	25.11	51.5	116.11	58.14	31.25	4	0	316.05
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											308.15
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											308.15

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**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	259 - PENDINE	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	21	16	23	26	31	33	12	0	0	162
I	No. of Discounts at 25%	0	13	7	6	16	12	13	3	0	0	70
J	Adjustments for year	0.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	1
H-(I*E)+J	Total Discounted Dwellings	0	17.75	14.25	21.5	23	28	29.75	11.25	0	0	145.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	11.83	11.08	19.11	23	34.22	42.97	18.75	0	0	160.96
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											156.94
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											156.94

Ref.	260 - ST. CLEARS TOWN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	67	168	390	249	281	199	31	2	0	1387
I	No. of Discounts at 25%	0	49	95	164	90	77	46	4	2	0	527
J	Adjustments for year	0.00	0.00	0.00	6.00	3.00	0.00	0.00	0.00	0.00	0.00	9
H-(I*E)+J	Total Discounted Dwellings	0	54.75	144.25	355	229.5	261.75	187.5	30	1.5	0	1264.25
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	36.5	112.19	315.56	229.5	319.92	270.83	50	3	0	1337.5
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											1304.06
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											1304.06

Ref.	261 - ST. ISHMAEL	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	206	103	144	186	123	65	35	7	0	869
I	No. of Discounts at 25%	0	42	54	66	67	43	17	8	1	0	298
J	Adjustments for year	0.00	0.00	0.00	2.00	2.00	0.00	1.00	0.00	0.00	0.00	5
H-(I*E)+J	Total Discounted Dwellings	0	195.5	89.5	129.5	171.25	112.25	61.75	33	6.75	0	799.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	130.33	69.61	115.11	171.25	137.19	89.19	55	13.5	0	781.18
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											761.65
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											761.65

Tax Base Calculation Tables

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Ref.	262 - TRELECH		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	4	7	37	92	112	50	7	0	0	309
I	No. of Discounts at 25%		0	2	4	14	27	35	9	1	0	0	92
J	Adjustments for year		0.00	0.00	0.00	0.00	2.00	0.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings		0	3.5	6	33.5	87.25	103.25	47.75	6.75	0	0	288
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	2.33	4.67	29.78	87.25	126.19	68.97	11.25	0	0	330.44
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												322.18
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												322.18

Ref.	263 - WHITLAND		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		1	119	122	287	158	115	33	13	0	0	848
I	No. of Discounts at 25%		0	89	59	133	51	33	3	4	0	0	372
J	Adjustments for year		0.00	0.00	0.00	0.00	1.00	2.00	1.00	0.00	0.00	0.00	4
H-(I*E)+J	Total Discounted Dwellings		1	96.75	107.25	253.75	146.25	108.75	33.25	12	0	0	759
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0.56	64.5	83.42	225.56	146.25	132.92	48.03	20	0	0	721.24
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												703.21
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												703.21

Ref.	264 - CENARTH		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	77	25	57	101	159	94	17	2	0	532
I	No. of Discounts at 25%		0	19	18	28	38	49	22	3	0	0	177
J	Adjustments for year		0.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	1
H-(I*E)+J	Total Discounted Dwellings		0	72.25	20.5	50	92.5	146.75	88.5	16.25	2	0	488.75
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	48.17	15.94	44.44	92.5	179.36	127.83	27.08	4	0	539.32
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												525.84
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												525.84

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**COUNCIL TAX BASE CALCULATION**

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Ref.	265 - LLANFIHANGEL AR ARTH	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	41	181	176	192	245	108	26	1	0	970
I	No. of Discounts at 25%	0	27	96	76	77	78	35	9	0	0	398
J	Adjustments for year	0.00	0.00	0.00	0.00	2.00	1.00	0.00	0.00	0.00	0.00	3
H-(I*E)+J	Total Discounted Dwellings	0	34.25	157	157	174.75	226.5	99.25	23.75	1	0	873.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	22.83	122.11	139.56	174.75	276.83	143.36	39.58	2	0	921.02
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											897.99
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											897.99

Ref.	266 - LLANFIHANGEL RHOS Y CORN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	18	31	55	56	47	22	7	0	0	236
I	No. of Discounts at 25%	0	10	17	23	19	14	2	0	0	0	85
J	Adjustments for year	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0
H-(I*E)+J	Total Discounted Dwellings	0	15.5	26.75	49.25	51.25	43.5	21.5	7	0	0	214.75
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	10.33	20.81	43.78	51.25	53.17	31.06	11.67	0	0	222.07
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											216.52
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											216.52

Ref.	267 - LLANGELER	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	53	183	422	254	464	160	27	4	1	1568
I	No. of Discounts at 25%	0	46	129	148	99	126	41	3	1	0	593
J	Adjustments for year	0.00	0.00	0.00	1.00	3.00	0.00	0.00	0.00	0.00	0.00	4
H-(I*E)+J	Total Discounted Dwellings	0	41.5	150.75	386	232.25	432.5	149.75	26.25	3.75	1	1423.75
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	27.67	117.25	343.11	232.25	528.61	216.31	43.75	7.5	2.33	1518.78
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											1480.81
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											1480.81



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**COUNCIL TAX BASE CALCULATION**

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Ref.	268 - LLANLLWNI		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	8	21	38	66	129	27	18	0	1	308
I	No. of Discounts at 25%		0	7	13	23	26	33	6	2	0	0	110
J	Adjustments for year		0.00	0.00	0.00	0.00	0.00	1.00	1.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings		0	6.25	17.75	32.25	59.5	121.75	26.5	17.5	0	1	282.5
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	4.17	13.81	28.67	59.5	148.81	38.28	29.17	0	2.33	324.74
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												316.62
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												316.62

Ref.	269 - LLANYBYDDER		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		1	91	155	141	177	109	26	9	1	0	710
I	No. of Discounts at 25%		0	69	73	64	72	39	6	3	2	0	328
J	Adjustments for year		0.00	0.00	0.00	0.00	1.00	0.00	0.00	0.00	0.00	0.00	1
H-(I*E)+J	Total Discounted Dwellings		1	73.75	136.75	125	160	99.25	24.5	8.25	0.5	0	629
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0.56	49.17	106.36	111.11	160	121.31	35.39	13.75	1	0	598.65
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												583.68
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												583.68

Ref.	270 - LLANYCRWYS		A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings		0	5	8	24	44	20	12	1	0	0	114
I	No. of Discounts at 25%		0	8	3	12	23	5	1	0	0	0	52
J	Adjustments for year		0.00	0.00	0.00	0.00	1.00	1.00	0.00	0.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings		0	3	7.25	21	39.25	19.75	11.75	1	0	0	103
F/G	Ratio to Band D		5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent		0	2	5.64	18.67	39.25	24.14	16.97	1.67	0	0	108.34
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE												105.63
	Adjustment for Class O Dwellings												
	TAX BASE 2018-19												105.63

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**COUNCIL TAX BASE CALCULATION**

**APPENDIX A**

Ref.	271 - PENCARREG	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	18	30	121	123	145	85	18	1	0	541
I	No. of Discounts at 25%	0	13	22	60	57	51	15	4	0	0	222
J	Adjustments for year	0.00	0.00	0.00	0.00	1.00	0.00	0.00	1.00	0.00	0.00	2
H-(I*E)+J	Total Discounted Dwellings	0	14.75	24.5	106	109.75	132.25	81.25	18	1	0	487.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	9.83	19.06	94.22	109.75	161.64	117.36	30	2	0	543.86
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											530.26
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											530.26

Ref.	272 - NEWCASTLE EMLYN TOWN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	71	98	152	54	102	43	13	3	0	536
I	No. of Discounts at 25%	0	53	62	86	27	38	11	1	4	0	282
J	Adjustments for year	0.00	0.00	0.00	2.00	1.00	0.00	0.00	0.00	0.00	0.00	3
H-(I*E)+J	Total Discounted Dwellings	0	57.75	82.5	132.5	48.25	92.5	40.25	12.75	2	0	468.5
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	38.5	64.17	117.78	48.25	113.06	58.14	21.25	4	0	465.15
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											453.52
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											453.52

Ref.	273 - CARMARTHEN	A-	A	B	C	D	E	F	G	H	I	TOTAL
H	Chargeable Dwellings	0	871	1818	1262	1251	856	443	126	9	0	6636
I	No. of Discounts at 25%	0	744	1014	631	515	287	108	25	4	0	3328
J	Adjustments for year	0.00	0.00	0.00	2.00	2.00	2.00	2.00	0.00	0.00	0.00	8
H-(I*E)+J	Total Discounted Dwellings	0	685	1564.5	1106.25	1124.25	786.25	418	119.75	8	0	5812
F/G	Ratio to Band D	5/9	6/9	7/9	8/9	1	11/9	13/9	15/9	18/9	21/9	
A	Band D Equivalent	0	456.67	1216.83	983.33	1124.25	960.97	603.78	199.58	16	0	5561.41
A x 97.5%	TAX BASE AT 97.5% COLLECTION RATE											5422.37
	Adjustment for Class O Dwellings											
	TAX BASE 2018-19											5422.37

## EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

### MODERNISING EDUCATION PROGRAMME (MEP) Strategic Outline Programme (SOP) - Band B Update

**Purpose:**

To consider the updated Strategic Outline Programme (SOP) of the MEP and to approve an updated prioritised programme for investment as part of Band B of the national 21<sup>st</sup> Century Schools Programme.

**Recommendations / key decisions required:**

1. That Executive Board approves the updated Strategic Outline Programme (SOP) of the MEP including an updated prioritised programme for investment as part of Band B of the national 21<sup>st</sup> Century Schools programme.
2. That Executive Board approves the selection of Band B projects for further exploration under the Mutual Investment Model (MIM).
3. That Executive Board approves funding arrangements for the Band B submission in order to confirm whether both capital and revenue elements are affordable.

**Reasons:**

To secure the approval of Executive Board for the updated Strategic Outline Programme (SOP) and the proposals detailed within the Band B Programme of Projects.

**Relevant Scrutiny Committee consulted: YES - 27<sup>th</sup> November 2017:**

Education and Children's Services Scrutiny Committee UNANIMOUSLY RESOLVED TO RECOMMEND TO THE EXECUTIVE BOARD:

- (1) That the updated Strategic Outline Programme of the MEP including an updated prioritised programme for investment as part of Band B of the National 21<sup>st</sup> Century Schools Programme be approved;
- (2) That the Band B projects selected for further exploration under the Mutual Investment Model be approved, however, the Committee's concerns regarding MIM be noted;
- (3) That funding arrangements for the Band B submission be approved in order to confirm whether both capital and revenue elements are affordable;
- (4) That the importance be stressed of consulting with the community, school and interested parties before projects proceed.

**Exec Board Decision Required:**

**YES** (in retrospect due to timing constrains in submission of the revised SOP)

**Council Decision Required: NO**

**Executive Board Member Portfolio Holder:**

Cllr. Glynog Davies (Education & Children Portfolio Holder)

<p><b>Directorate:</b> Education and Children <b>Name of Director:</b> Gareth Morgans <b>Report Author:</b> Simon Davies</p>	<p><b>Designation:</b>  Director of Education and Children's Services  Modernisation Services Manager</p>	<p><b>Tel No &amp; E-Mail:</b>  Ext 6470 <a href="mailto:EDGMorgans@carmarthenshire.gov.uk">EDGMorgans@carmarthenshire.gov.uk</a>  Ext 6471 <a href="mailto:sidavies@carmarthenshire.gov.uk">sidavies@carmarthenshire.gov.uk</a></p>
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**EXECUTIVE SUMMARY**  
**EXECUTIVE BOARD**  
**18<sup>TH</sup> DECEMBER 2017**

**MODERNISING EDUCATION PROGRAMME (MEP)**  
**Strategic Outline Programme (SOP) - Band B Update**

**1. Background**

- 1.1 Preparations for the national 21st Century Schools Programme commenced in 2010 through an invitation by the Welsh Government (WG) to local authorities to submit a Strategic Outline Programme (SOP) for the modernisation of their whole schools estate, placed within four bands for investment (A-D), in order of priority according to most urgent need.
- 1.2 During 2010 a major review of the MEP was completed as part of the process of developing the County Council's submission and the Authority's Strategic Outline Programme (SOP) identified the preferred option for programme delivery to implement on a local area basis.
- 1.3 As part of that review the County Council resolved that the MEP "*be reviewed and revised in the future every two years or otherwise as required to ensure consistency with the timeframe of the national 21<sup>st</sup> Century Schools Programme*". It has been a central feature of the MEP since its inception that it needs to retain flexibility at its core to ensure that the programme remains current and responsive to changes in the education policy framework and the needs of constantly developing society and communities.
- 1.4 Since that time Executive Board had approved an updated MEP three times in 2011, 2013 and most recently on the 20<sup>th</sup> June 2016.
- 1.5 The Band A programme was initially established to commence in April 2014 and extend for 6 years to 2020 but the Welsh Government subsequently announced its intention to bring forward the target date for the completion of Band A to 2019.
- 1.6 Through the initial submission process Carmarthenshire's Band A programme was approved at a value of £86.7 million (funded 50% by grant from WG and 50% from the Council's own resources). Welsh Government requires this funding to be spent by 2019.
- 1.7 In May 2017 the WG confirmed its intention to progress with the 21st Century Schools and Education Band B Programme. Band B is anticipated to start in April 2019 and run to March 2024.

**2. Programme of Projects - Band A Progress to Date**

- 2.1 Carmarthenshire's Band A commenced in 2014/15 following approval of Band A projects as part of the MEP update in 2013.
- 2.2 Band A was updated again in 2016 following a reassessment in line with the approved MEP investment criteria and the practicalities of delivery.

- 2.3 Currently, 69% (11 out of 16) of projects have WG Full Business Case (FBC) approval as

follows:

- Completed (4 projects) – Strade, Carreg Hirfaen, Burry Port & Llanelli Vocational Village
  - Approved and on site (6 projects) – Pen Rhos (Seaside), Trimsaran, Coedcae, Parc Y Tywyn, St John Lloyd and Pontyberem.
  - Approved with construction due to commence (1 Project) - Llangadog
- 2.4 Approximately 48% (£20.6m) of the Band A grant funding (£43.35m) has been claimed and spent by the end of the 2016/17 financial year.
- 2.5 The remaining £22.75m Band A grant is required to be spent and claimed by 31st March 2019. The following projects are currently in development:
- In development (5 projects) – Rhys Pritchard, Rhydygors, Dewi Sant, Laugharne, and Gorslas.
- 2.6 A couple of projects in development in Band A are causing concern as a result of some issues in relation to public objection to preferred sites and complex statutory processes.
- 2.7 WG's recent announcement to revise the School Organisation Code to include a presumption against closure for rural schools will make completing statutory processes more difficult and time consuming as local authorities will need to demonstrate they have explored all federation options before proposing to reorganise. Some schools identified as rural in the consultation on the new School Organisation Code are included in a project currently in Band A.
- 2.8 In order to mitigate the risk of delay, projects identified in Band B of the MEP programme are being developed early for acceleration should it be concluded that Band A projects are not be in a position to claim WG grant by March 2019.

### **3. Submission of Programme of Projects – Band B**

- 3.1 In October 2016, the WG requested Authorities to provide information in respect of potential projects for Band B of the national 21<sup>st</sup> Century Schools and Education Programme. The data received was used to inform the development of the national Strategic Outline Case (SOC) for Band B of the Programme, and approved by the Cabinet Secretary in May 2017.
- 3.2 This approval paved the way for the next phase of development of the Band B Programme and as a result Authorities were asked to complete the following by 31<sup>st</sup> July 2017:
- Revised Strategic Outline Programme (SOP)
  - Projects to be included in Band B to be progressed between 2019 and 2024.
- 3.3 Unfortunately, due to the tight timescales imposed by the WG and the impact of the Local Authority elections, it was not possible to seek democratic approval prior to submission and is now being undertaken retrospectively.
- 3.4 The relevant documents for Carmarthenshire are attached in Appendix 1 and 2:
- Draft Revised Strategic Outline Programme – Appendix 1
  - Band B Proposed Schools Datasheet – Appendix 2
- 3.5 The priority order of projects are the same as those approved by Executive Board in 2016 with one exception. A strategic project to support the Behavioural Services Review has

been included towards the end of Band B. Should the recommendations of the review be approved by members, this project has been included in Band B to facilitate its delivery.

- 3.6 WG have advised that the budget for Band B of the Programme is fixed and prioritisation of projects will take place should applications for funding exceed the resources available.

#### 4. Funding

4.1 The 21st Century Schools Programme has major financial implications for the County Council. The current estimate of the cost of the remaining investment to make all schools in Carmarthenshire to be retained for the long-term fit for purpose for the 21st Century is £276 million (from 2017/18). This is a planning figure and is certain to change over time as the detailed requirements of individual projects are developed. The planning figures do not include any allowance for inflation.

4.2 The delivery of the MEP to date has been made possible by the establishment of an innovative funding strategy for capital investment which has drawn upon and integrated a variety of funding sources:

- Welsh Government Grants.
- Capital Receipts – generated through the disposal of operationally redundant school assets. County Council has resolved that all receipts generated through the sale of former school premises are ring-fenced for reinvestment in the school modernisation programme.
- Prudential Borrowing – serviced by contributions from revenue generated through efficiency gains arising from the rationalisation of the schools network and through an adjustment in the delegated schools budget.
- General Capital – contributions from the Council's general capital allocation.
- S106 Agreements – contributions from developers of residential properties.

4.3 The Council has effectively exhausted its capacity to generate any further prudential borrowing from the operational schools budget as it has already done much in this area and there is now little scope for further revenue contributions. For example, education spend is by now slightly below the Indicative Budget Assessment (IBA) and with the prognosis for revenue budgets in future years there is unlikely to be further potential in this area. Further revenue gain to be secured by the continuing rationalisation of the schools network will be required to offset the effects of expected budget reductions in future years.

4.4 The overall expenditure for the 21st Century Schools programme Band A has been agreed at £86.7m with 50% of the funding provided by WG. WG has extended the Local Government Borrowing Initiative to the programme, allowing it to bring forward additional funding for its element of the programme and bringing forward the timeframe for completion of Band A to 2019.

4.5 The level of County Council funding is formalised each year through the annual budget setting process. It is inevitable that estimate of capital need will change in the future as the detailed requirements for individual projects are progressed through the stages of development.

4.6 WG have confirmed that Band B of the 21st Century Schools and Education Programme, will be funded by both capital and revenue budgets:

- A capital funding programme will continue for Band B at the current WG grant funding level of £100-120m per annum for all LAs in Wales (£600m for the 5 year

programme).

- £500m revenue funding is available via an optional Mutual Investment Model (MIM) approach for larger collaborative contractor led projects in Band B

4.7 WG have considered grant intervention rates for Band B and have recently indicated the following:

- The grant rate for capital will remain at 50%.
- The grant rate for Voluntary Aided schools will remain at 85%. (However, unlike the Band A arrangement, the 85% will not be subsumed within the overall 50% grant rate for a Local Authority).
- The grant rate for projects funded through the Mutual Investment Model (MIM) will be 75%.

4.8 The total amount of the projects identified in Carmarthenshire's Band B is currently £129.5m. The capital and revenue requirements to deliver the programme are as follows:

- WG - £52.25 Capital (2019-2024), £18.75m Revenue (MIM over 25 years)
- Carmarthenshire - £52.25m Capital (2019-2024), £6.25 Revenue (MIM over 25 years)

4.9 The Authority is required to provide details of funding arrangements for the Band B submission and confirm whether or not it is affordable for both capital and revenue elements.

4.10 There is currently £5.5m identified in the in the capital programme in 2020/21 as the Authority's contribution to Band B projects.

## **5. The Mutual Investment Model (MIM)**

5.1 The revenue-funded Mutual Investment Model programme is intended to boost the amount of resource WG has available to support investment in new schools and colleges.

5.2 The MIM will be used for contracts whereby the successful contractor will design and build the new facilities and provide the finance to do so. The successful contractor will also provide maintenance and lifecycle services for the facilities in the long term. This approach of using a single contract has been used in Private Public Partnerships across the UK.

5.3 The Mutual Investment Model is the Welsh Government's form of Public Private Partnership, developed as a result of wider statistical issues to previous models. Key features of the Mutual Investment Model, in addition to the investment in the long term maintenance of the facilities, are:

- the Welsh Government will be able to invest in the company which will provide the design, build, finance and maintenance services. This will ensure that the public sector shares in the earnings of the project company;
- furthermore, the Welsh Government will appoint a director onto the Board of the company;
- the successful contractor will be required to provide community benefits as part of their bid proposals. There will be "core" benefits specified in the contract which have to be provided;
- payments will not start until the facilities are built and available for use, and will be paid for via a monthly revenue charge over a period of 25-years: the Service Payment;
- schools and colleges will remain responsible for their other non-educational services



e.g. cleaning; catering; grounds maintenance; updating and maintaining their furniture, fittings and equipment. The school caretaker will stay as part of the school staff;

- the Office of National Statistics has reviewed the Mutual Investment Model proposal and has classified this as not on the Welsh Government balance sheet.

5.4 Should the Authority enter into a MIM project then it will be responsible for managing the contract of the MIM for the 25 year period.

5.5 Local Authorities were asked to indicate an interest in applying for MIM funding and identify projects considered suitable as part of the Band B application. It was originally decided to propose Ammanford and Llandeilo projects as potential MIM projects (subject to further analysis and agreement) for Carmarthenshire's Band B application.

5.6 Since the Band B submission, Officers have had further discussions with colleagues from the WG and been advised that the projects identified may not be suitable in their entirety. Also, WG have advised that there is scope to change the projects identified for MIM. Officers are still in consultation with WG officials on this issue.

5.7 The projects that will lend themselves to the MIM approach are:

- New build (i.e. all the facilities are new build not just new build extension)
- Projects which will have completed their statutory consultations or are a good way through by June 2018;
- Projects where authorities / colleges are sure that there will be sustained demand for places;
- Projects without complicated land ownership issues.

5.8 In order to provide a financially viable proposition to the private sector market, the WG will be putting projects together into Band B MIM groups. Authorities need to be willing to work with other authorities/projects which are in their group. The number of projects in a group may not be very large, depending upon number of high value projects which are proposed.

5.9 Should local authorities not be interested in pursuing schemes through the Mutual Investment Model approach, they can still apply through the capital funding programme.

## 6. Recommendations

6.1 That Executive Board approves the updated Strategic Outline Programme (SOP) of the MEP including an updated prioritised programme for investment as part of Band B of the national 21st Century Schools programme.

6.2 That Executive Board approves the selection of Band B projects for further exploration under the Mutual Investment Model (MIM).

6.3 That Executive Board approves funding arrangements for the Band B submission in order to confirm whether both capital and revenue elements are affordable.

**YES**

**DETAILED REPORT ATTACHED?**

**Appendix 1 - Draft Revised Strategic Outline Programme**

**Appendix 2 - Band B Proposed Schools Datasheet**

## IMPLICATIONS



I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report :

Signed: **E.D.G. Morgans** Director of Education and Children's Services  
**S. Davies** Modernisation Services Manager

Policy and Crime & Disorder <b>YES</b>	Legal <b>YES</b>	Finance <b>YES</b>	ICT <b>YES</b>	Risk Management Issues <b>YES</b>	Organisational Development <b>YES</b>	Physical Assets <b>YES</b>
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### 1. Policy, Crime & Disorder and Equalities

The proposals set within the report are in line with published policy and strategic direction of the authority.

### 2. Legal

The County Council's constitution provides that responsibility for the Modernising Education Programme is an executive function.

Statutory procedures will need to be completed to institute constitutional change in the structure of schools where the rationalisation of provision is proposed.

Planning permission will need to be secured for the development of the infrastructure projects proposed.

Building regulations approval will need to be secured for premises developments and modernisation.

### 3. Finance

The 21st Century Schools Programme has major financial implications for the County Council. The current estimate of the cost of the remaining investment to make all schools in Carmarthenshire to be retained for the long-term fit for purpose for the 21st Century is £276 million (from 2017/18). This is a planning figure and is certain to change over time as the detailed requirements of individual projects are developed. The planning figures do not include any allowance for inflation.

The delivery of the MEP to date has been made possible by the establishment of an innovative funding strategy for capital investment which has drawn upon and integrated a variety of funding sources:

- Welsh Government Grants.
- Capital Receipts – generated through the disposal of operationally redundant school assets. County Council has resolved that all receipts generated through the sale of former school premises are ring-fenced for reinvestment in the school modernisation programme.
- Prudential Borrowing – serviced by contributions from revenue generated through efficiency gains arising from the rationalisation of the schools network and through an adjustment in the delegated schools budget.
- General Capital – contributions from the Council's general capital allocation.
- S106 Agreements – contributions from developers of residential properties.

The Council has effectively exhausted its capacity to generate any further prudential borrowing from the operational schools budget as it has already done much in this area and there is now little scope for further revenue contributions.

For example, education spend is by now slightly below the Indicative Budget Assessment (IBA) and with the prognosis for revenue budgets in future years there is unlikely to be further potential

in this area. Further revenue gain to be secured by the continuing rationalisation of the schools network will be required to offset the effects of expected budget reductions in future years.

The overall expenditure for the 21st Century Schools programme Band A has been agreed at £86.7m with 50% of the funding provided by WG. WG has extended the Local Government Borrowing Initiative to the programme, allowing it to bring forward additional funding for its element of the programme and bringing forward the timeframe for completion of Band A to 2019.

The level of County Council funding is formalised each year through the annual budget setting process. It is inevitable that estimate of capital need will change in the future as the detailed requirements for individual projects are progressed through the stages of development.

WG have confirmed that Band B of the 21st Century Schools and Education Programme, will be funded by both capital and revenue budgets:

- A capital funding programme will continue for Band B at the current WG grant funding level of £100-120m per annum for all LAs in Wales (£600m for the 5 year programme).
- £500m revenue funding is available via an optional Mutual Investment Model (MIM) approach for larger collaborative contractor led projects in Band B

WG have considered grant intervention rates for Band B and have recently indicated the following:

- The grant rate for capital remains at 50%.
- The grant rate for Voluntary Aided schools remains at 85%. (However, unlike the Band A arrangement, the 85% will not be subsumed within the overall 50% grant rate for a Local Authority).
- The grant rate for projects funded through the Mutual Investment Model (MIM) is 75%.

The total amount of the projects identified in Band B is currently £129.5m. The capital and revenue requirements to deliver the programme are as follows:

- WG - £52.25 Capital (2019-2024), £18.75m Revenue (MIM over 25 years)
- Carmarthenshire - £52.25m Capital (2019-2024), £6.25 Revenue (MIM over 25 years)

The Authority is required to provide details of funding arrangements for the Band B submission and confirm whether or not it is affordable for both capital and revenue elements.

There is currently £5.5m identified in the in the capital programme in 2020/21 as the Authority's contribution to Band B projects.

#### 4. ICT

The use of ICT is of critical importance to the management and delivery of education in order to facilitate and implement the breadth of curricular choice necessary for all learners. The provision of new, adapted, or refurbished buildings will provide the opportunity for ICT to be integrated into modern infrastructure which is extremely reliable and easy to use.

The aspirations are to develop real and virtual workspaces which help to make effective, personalised learning a reality for all students; enable teachers and other professionals to focus on their core tasks and be more effective; and provide parents and carers with easy access to information about learners' achievements and progress. Also it will facilitate access to high quality learning materials in a wide range of settings through as wide a range of end-user devices as possible.

#### 5. Risk Management Issues

Risk management will be fundamental to the effective delivery of the school modernisation programme and its individual projects.

Projects will be managed in line with recognised best practice for the construction sector, including the use of risk registers at all stages of planning and delivery.

Risks are managed by the Corporate Modernising Education and Communities Programme (MECP) Board.

## **6. Organisational Development**

Proposals for the transformation of school structures will inevitably have significant staffing implications requiring workforce re-modelling. Specific issues cannot be forecast with accuracy at this early stage and issues will be dealt with and reported as individual projects or groups of projects develop in accordance with established human resource policies.

## **7. Physical Assets**

Proposals for the transformation and modernisation of the schools network will have significant implications for the schools estate. This will involve the creation of new school premises and the refurbishment of some existing school premises. It will also result in some existing operational assets becoming redundant. When this situation arises assets will be managed in accordance with established policies and in the context of the Council's match funding for the programme being partly met from anticipated capital receipts from the sale of surplus assets.

Investment in new facilities will have regard to partnership working and will foster the co-location of services, including those managed by partner organisations, where practical and beneficial.

# CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed:                    E.D.G Morgans                    Director of Education and Children's Services  
                                 S. Davies                            Modernisation Services Manager

## 1. Scrutiny Committee

Education and Children's Services Scrutiny Committee was consulted on 27th November 2017 and UNANIMOUSLY RESOLVED TO RECOMMEND TO THE EXECUTIVE BOARD:

- (1) That the updated Strategic Outline Programme of the MEP including an updated prioritised programme for investment as part of Band B of the National 21st Century Schools Programme be approved;
- (2) That the Band B projects selected for further exploration under the Mutual Investment Model be approved, however, the Committee's concerns regarding MIM be noted;
- (3) That funding arrangements for the Band B submission be approved in order to confirm whether both capital and revenue elements are affordable;
- (4) That the importance be stressed of consulting with the community, school and interested parties before projects proceed.

## 2. Local Member(s)

Local Members will be consulted on individual school reorganisation proposals as they are taken forward.

## 3. Community / Town Council

Town and Community Councils have not been consulted at this stage as this is a strategic matter for the County Council.

Town and Community Councils will be consulted on individual school reorganisation proposals as they are taken forward.

## 4. Relevant Partners

Key partner organisations, including the Church in Wales, Roman Catholic Church and Coleg Sir Gar, are consulted on proposals that affect them.

Schools affected will be fully consulted on individual school reorganisation proposals as they are taken forward.

## 5. Staff Side Representatives and other Organisations

Not applicable at this stage as this is a strategic matter.

**Section 100D Local Government Act, 1972 – Access to Information  
List of Background Papers used in the preparation of this report:**

Title of Document	File Ref No.	Locations that the papers are available for public inspection
Carmarthenshire 21 <sup>st</sup> Century Schools Modernising Education Programme BIENNIAL REVIEW 2016	MEP	<a href="http://democracy.carmarthenshire.gov.wales/ieListDocuments.aspx?CId=131&amp;MId=350&amp;Ver=4">http://democracy.carmarthenshire.gov.wales/ieListDocuments.aspx?CId=131&amp;MId=350&amp;Ver=4</a>
21 <sup>st</sup> Century Schools Website		<a href="http://www.21stcenturyschools.org">www.21stcenturyschools.org</a>
21 <sup>st</sup> Century Schools: Information Document (May 2010)	MEP	<a href="http://www.wales.gsi.gov.uk">www.wales.gsi.gov.uk</a>
21 <sup>st</sup> Century Schools: Information Document (May 2010) - Summary	MEP	<a href="http://www.wales.gsi.gov.uk">www.wales.gsi.gov.uk</a>
21 <sup>st</sup> Century Schools Strategic Outline Programme Template	MEP	<a href="http://www.wales.gsi.gov.uk">www.wales.gsi.gov.uk</a>
Modernising Education Programme (May 2005)	MEP	Department for Education and Children Building 2, Parc Dewi, Carmarthen.

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# **Carmarthenshire Local Authority**

**Strategic Outline Programme  
(SOP) - Band B Update**

**For return by 31 July 2017**

## **Guidance**

This form aims to capture the proposed changes to your Band B Programme since the most recent version of your Strategic Outline Programme/ Estate Strategy was agreed.

Please complete all relevant sections of this form including the statement of approval of this information in **Section 12**.

Please note that the budget for Band B of the Programme is fixed and prioritisation of projects will take place should applications for funding exceed the resources available. In the first instance projects will be prioritised based on building condition and sufficiency, but the exercise may take into account other factors such as flexibility of assets, efficiency of the education estate and deprivation.

**Please return a signed, electronic copy of the form, to Jo Larnar, Programme Director of 21st Century Schools and Education Programme by Monday 31 July via:**

**[21stcenturyschools@wales.gsi.gov.uk](mailto:21stcenturyschools@wales.gsi.gov.uk)**

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**Strategic Outline Programme – Band B Update - July 2017**

**1. Requested Band B Programme Envelope**

<b>Requested total of Band B envelope</b> <i>e.g. £15,000,000</i>	<b>£129.5m</b>
<b>Requested Welsh Government contribution</b> <i>e.g. £7,500,000</i>	<b>£52.25 Capital</b> <b>£18.75 Revenue (MIM)</b>
<b>LA/ FEI contribution</b> <i>e.g. £7,500,000</i>	<b>£52.25m Capital</b> <b>£6.25 Revenue (MIM)</b>

**2. Summary of changes**

<b>What has changed since the latest version of your SOP/ Estates Strategy?</b> <i>1000 words maximum</i>
<p>In 2010 the County Council resolved that Carmarthenshire’s 21<sup>st</sup> Century Schools Programme known as the Modernising Education Programme (MEP) “be reviewed and revised in the future every two years or otherwise as required to ensure consistency with the timeframe of the national 21st Century Schools Programme”.</p> <p>Furthermore, it has been a central feature of the MEP since its inception that it needs to retain flexibility at its core to ensure that the programme remains current and responsive to changes in the education policy framework and the needs of constantly developing society and communities.</p> <p>This integrated strategic vision forms the basis for what learning looks and feels like in a 21st Century School in Carmarthenshire. This is embedded in our well established Policy for Learning and builds on successful projects already implemented where national objectives and targets have been surpassed. Carmarthenshire’s policy identifies the promotion of learning as its core purpose and believes that effective learners know how to learn on their own and with others; can progressively manage their own learning; enjoy learning, and are confident and motivated to continue learning throughout life.</p> <p>Within Carmarthenshire, its schools and other learning providers we promote a culture that supports the exploration of views about learning and encourages the development of a shared understanding of learning.</p> <p>This is facilitated by:</p> <ol style="list-style-type: none"> <li>1. engaging everyone in dialogue about how we learn;</li> <li>2. sharing practice on ways of engaging all pupils in thinking and talking about their own learning;</li> </ol>

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3. clarifying and enhancing the role of Assessment for Learning.

This will lead to the following outcomes:

1. effective learners who have a greater propensity to achieve;
2. providers who engage everyone in promoting learning, in agreeing and implementing policies for learning, and who engage in action research centred on learning.

Carmarthenshire's 21st Century Carmarthenshire School is continually refined to provide inspirational learning settings where:

1. Sufficient accommodation for the number of pupils which provides a suitable and stimulating learning environment with an ample supply of good learning resources well matched to pupil's needs;
2. The entire learning environment is safe and secure, is energy efficient and kept in good condition and repair to provide a learning community for all engaged in school life and include community facilities where appropriate;
3. There is an inclusive community where each pupil has equal access to all areas of provision and full use is made of available resources including the co-location of ALN provision where appropriate;
4. All pupils have the freedom to make progress in gaining skills in communication, numeracy, ICT and Welsh language in technology rich environments with optimum connectivity;
5. There is appropriate and sustainable investment in connectivity, infrastructure and ICT resources to allow young people to use technology in their subject learning, within and beyond the classroom and for schools to become more effective, innovative and creative institutions;
6. All pupils are punctual, have good attendance, are well behaved and show care and respect and concern for others and take responsibility for their own actions;
7. All parents are kept well informed about their children's achievements, wellbeing and development;
8. All staff share a sense of vision and purpose, focused sharply on achieving good outcomes for all pupils supported by an effective network of professional practice with other schools and partners;
9. All staff have the freedom to employ a good range of teaching and learning approaches to inspire and challenge their pupils and also provide a pattern of improvement or maintenance of good standards.

The following strategic objectives have been established for the MEP and continue to direct its future delivery:

- To develop a schools network that is educationally effective, resource efficient and sustainable for the long term.
- To develop a pattern of provision within which every learning setting is capable of facilitating a high quality education to all of its learners, either

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as an individual institution or as part of a federation or collaboration with other settings or providers.

- To create school environments that allow every child within every school to access a curriculum and experience teaching that motivates them to achieve their full potential, whilst also facilitating a programme of extra-curricular activities that stimulate their physical and emotional well-being.
- To develop infrastructure at all schools that is equipped for learning in the 21st century, facilitating the realisation of core objectives for raising educational standards and sustaining them at high levels of performance.
- To deliver a strategic approach to capital investment, integrated with a programme for the rationalisation of provision across the schools network to effectively match supply with demand.
- To rebuild, remodel, refurbish or modernise all school settings that are to be retained for the long-term, so that they conform as closely as practicable to adopted design standards.
- To contribute to the achievement of wider policy objectives, for example, community regeneration and renewal, healthy lifestyles, etc., through the development of appropriate enabling infrastructure.
- To improve the efficiency and educational viability of the schools sector by reducing the number of empty places to a reasonable level, whilst facilitating wherever practicable the expression of parental preference, responding effectively to demographic change.
- To develop infrastructure at schools that is fully accessible to all persons and enables all learners to access a high quality education, irrespective of individual needs.
- To develop individual and collaborative school solutions that contribute to a county-wide single comprehensive education system.

Significant improvements have been made to school building condition. In 2010 54% of Carmarthenshire's Primary and Secondary school buildings were graded condition C and 1% were graded D for condition.

After the Band A has completed, 38% of our school building stock will be graded C for condition. There will be 1 building (1%) graded as D. This school has only recently been downgraded from grade C and will be addressed as a priority in the Band B programme. The design of this new replacement building has already been finalised.

After Band B has been completed, 41% of the school buildings graded at C at the beginning of the Band B programme will improve to grade A for building condition.

Backlog maintenance issues for schools selected for Band B will be reduced by 100% in the primary sector and between 80% and 100% in the Secondary sector.

### **3. Strategic Case**

**How does your Programme link to local and national strategies e.g. the Wellbeing of Future Generations (Wales) Act 2015, Welsh medium and childcare strategies?**

*1000 words maximum*

**Carmarthenshire’s 21<sup>st</sup> Century Schools Programme has links to local and national strategies as outlined below:**

#### **Welsh Language**

Carmarthenshire County Council has a statutory responsibility under Part 4 of the School Standards and Organisation (Wales) Act 2013 to prepare a Welsh in Education Strategic Plan (WESP) for its area with the explicit aim of improving the planning of the provision of education through the medium of Welsh, for improving the standards of that education and of the teaching of Welsh. The Council is required to set targets for the aims.

One of the aims for Carmarthenshire County Council’s Plan is to “increase the provision of Welsh medium education in Carmarthenshire and ensure linguistic continuity from the nursery sector along the key stages to the secondary sector so that every pupil becomes fluent and confident in Welsh and English.” The WESP expects every school, including schools that are currently designated as English medium to progress along the language continuum, to increase the proportion of education that is delivered through the Welsh language.

Over time, bilingualism will increasingly become an employment skill. For example, all public organisations in Wales are subject to new statutory Welsh language standards and progressively over time will need to recruit increasing numbers of Welsh speakers to deliver services. Possessing Welsh language skills will give individuals a competitive advantage when seeking employment. It is the belief of the County Council that all children benefit from a truly bilingual education, which provides wider skills development, such as cognitive ability, task understanding and flexibility, enhanced powers of concentration, etc. and that all children should receive these opportunities.

The prioritisation of capital investment in the modernisation of school premises is founded upon consideration of a combination of criteria including Welsh Language Development. Investment is prioritised towards projects that promote the expansion of Welsh medium education or the development of bilingual education in support of the objectives set out in the County Council’s Welsh in Education Strategic Plan.

Carmarthenshire County Council considers a wide range of National and Local policies while prioritising capital investment schemes:

#### **National Policy Considerations**

- Welsh Government Welsh-Medium Education Strategy (2010)
- Welsh Government Welsh Language Strategy 2012 to 2017 – A Living Language: A language for Living

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- Welsh Government – Increasing the Number of Communities where Welsh is the Main Language (December 2013)
- Welsh Government – Draft Strategy for a Million Welsh Speakers by 2050

**Local Policy Considerations**

- Carmarthenshire County Council Welsh Language Development Strategy
- Draft Welsh in Education Strategic Plan (2017-2020)

**Well-being of Future Generations (Wales) Act 2015**

The Strategic Outline Programme for Carmarthenshire will demonstrate the 5 ways of working as shown below:

- **Long Term** – The 21<sup>st</sup> Century Schools Programme will create sustainable schools with 21<sup>st</sup> Century facilities in line with MEP objectives to improve learning environments for children with better educational outcomes. Greater economy through better use of resources to improve the efficiency and cost-effectiveness of the education estate.
- **Prevention** – The programme will ensure that investment projects within the programme will provide buildings fit for the 21<sup>st</sup> Century.
- **Integration** –The investments provided as part of the 21<sup>st</sup> Century Schools Programme will improve the learning environment, condition and suitability of the school estate whilst taking into account the seven national well-being goals.
- **Collaboration** – In Carmarthenshire we work in collaboration with stakeholders to provide investment in our schools. The revised Modernising Education Programme has been approved by the County Council’s Executive Board on the 20<sup>th</sup> June 2016 when a report was taken for members to consider a review of MEP and to approve an updated priorities programme for school investments in Carmarthenshire. We collaborate with local members and Headteachers to ensure a sustainable solution is achieved which best suits the needs of the community. An example of this collaboration in Carmarthenshire is the Llanelli Vocational Village which involved five secondary schools a special school and a further education college working together to share vocational resources.
- **Involvement** – Local members, Executive Board members and stakeholders such as Headteachers and Governors are all involved in investment projects and consulted upon through the processes involved with the proposed investment and delivery. We also consult with other professional bodies such as Estyn and Constructing Excellence etc.

**Qualified for Life**

The aspirations for every learner in Carmarthenshire aligns well with the vision for the future of education in Wales as noted in the Welsh Government document “Qualified for Life”.

Carmarthenshire’s 21<sup>st</sup> Century Schools Programme aims to provide an improved learning environment which will inspire both teachers and pupils to succeed.

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**Taking Wales Forward**

Carmarthenshire's 21<sup>st</sup> Century Schools Programme aligns with the Taking Wales Forward document by;

- Investing in school buildings to drive up school standards;
- Working with communities to protect local facilities that bring people together;
- Introduce measures to prevent unnecessary closures and to help communities take ownership of community assets where appropriate;
- Continue to support the Flying Start Programme in appropriate areas alongside new school developments.

**Infant Class Size Capital Grant**

The authority is currently in the process of reviewing its Infants Class sizes for the application of the Welsh Government Infant Class Size Capital Grant. Details on the specific schools will be provided in the submission which is due by 31 August 2017, extended from 30 July 2017.

All Carmarthenshire's 21<sup>st</sup> Century Schools capital investment schemes are designed to ensure that neither primary nor secondary schools have classes built for more than 30 pupils.

**Childcare Strategies**

Carmarthenshire County Council has a statutory obligation to review the number and type of schools it has in its areas. The 21<sup>st</sup> Century Schools Programme is developed in collaboration with stakeholders.

In April 2016 Carmarthenshire County Council released an Early Years Statement following a Review of Early Years provision and practice within Carmarthenshire schools. The statement clarified the admission to early years provision; and the provision of early years education in Carmarthenshire and addressing the lack of early years education provision in some areas of the county. The Local Authority wants to encourage schools to explore the opportunities that are available for developing wrap around care, either within the school or in partnership with an external registered childcare provider and is developing pathways for category 3-11 schools and for category 4-11 schools by considering the 30 hour childcare offer.

Whilst reviewing an area, consultation is undertaken with early years providers to evaluate the school's ability to accommodate the additional provision against current and projected pupil numbers in line with current provision and gaps identified in the local Childcare Sufficiency Assessment 2017 – 2022.

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**Highlight any differences to your strategic case since the latest version of your SOP/ Estates strategy was produced.**

**Please provide details of benefits and risks of your Programme.**

*1000 words maximum*

**The main benefits, risks and constraints associated with Carmarthenshire's 21<sup>st</sup> Century Schools programme are outlined below:**

**Benefits**

- Learning opportunities enhanced through improved building and facilities with pupils having access to high quality education.
- Improved learning environments for children with better educational outcomes.
- Facilitates the effective delivery of the Foundation Phase curriculum; Addresses areas of greatest need first in line with clearly defined objectives which have been negotiated and agreed with education professionals;
- Facilitates the effective delivery of 14 to 19 Learning Pathways programmes by providing vocational facilities to be shared by schools and the further education college within area clusters, supported by collaborative and integrated governance and commissioning structures; Integrates all voluntary aided schools within a coherent and holistic whole school system programme for transformation, development and modernisation.
- Sets out a realistic timeframe for delivery, drawing upon well-established and proven project management and construction arrangements; Targets the removal of large numbers of surplus school places at the earliest feasible time;
- Proposes integrated projects which address primary and secondary phase needs side by side;
- Use ICT and blended learning and on-line curriculum to reduce the need to physically travel to school sites to access learning.
- Greater economy through better use of resources to improve the efficiency and cost-effectiveness of the education estate.
- A more sustainable education system reducing the recurrent costs and carbon footprint.
- Access to a wider curriculum.
- Greater job security and personal development opportunities.
- Greater opportunity for staff to specialise in subject areas.
- Increase the provision of Welsh medium education in Carmarthenshire.
- Community use of school facilities.
- Carmarthenshire 'Cadet' scheme (Apprenticeships) will stimulate employment in the local contraction industry.

**Risks:**

**Business and Political Risks**

- Schemes exceeding allocated amount of WG funding.
- Newly built or re-developed schools may attract pupils from other schools or increased catchment area drift.

- Poor contractor capabilities.

**Service Risks**

- Legislative changes.
- Welsh Government policy changes.

**External Environmental Risks**

- A change in political climate at Welsh Government.
- Delay in Welsh Government approval of business cases.
- Issues relating to planning permission or planning constraints.

**Constraints:**

**Design Constraints**

- The budget
- Site boundaries
- Planning and Building Restrictions
- Available Technology

**Business Constraints**

- Timeline- Key dates / Milestone dates
- Budget
- Resources

**Economic Constraints**

- Tree and wildlife preservation
- Hazardous materials
- Excavation
- Noise
- Vibration
- Traffic

**Social Constraints**

- Opposition to the project (can result in major alternations to the original plans)
- Media pressure
- Political pressure



## 4. Economic Case

**Highlight any differences to the Economic Case since the latest version of your SOP/ Estates strategy was produced.**

*1000 words maximum*

Each time Carmarthenshire's 21<sup>st</sup> Century Schools Programme is reviewed in accordance with County Council's resolution in 2010, every school in Carmarthenshire is evaluated against a set of evidence based criteria, which allow an assessment of the school's operational viability to be made and decisions taken on the relative investment need at all schools.

This allows the Authority to objectively determine a programme for the strategic review of the schools network and investment in the modernisation of the schools estate in a manner that is transparent and demonstrably fair.

Criteria have been developed locally, through consultation with representative head teachers, and agreed as appropriate indicators of viability and investment need.

The criteria (critical success factors) against which the successful delivery of projects are prioritised are outlined below:

### **CSF 1 – Business needs**

- The option must satisfy all of the investment objectives and associated business needs determined for the initiative.
- The option must also optimise compliance with these objectives throughout any implementation.
- The option must be the best (long term) fit with the demands for skills of the business and commercial communities within the area.

### **CSF 2 – Strategic fit**

- The option must fit within and promote National and Regional strategies presented in Business Strategies.
- The option must complement the vision and standards that Carmarthenshire Council have developed for schools.
- The option must be the best (long term) fit with the strategies of the business and commercial communities within the area.

### **CSF 3 – Benefits optimisation**

- Achieves highest standard of service provision on behalf of pupils, staff, families, parents/carers.
- Sustainable model(s) of learning provision within Carmarthenshire which meet the needs and aspirations of all children both now and in the future.

### **CSF 4 – Potential achievability**

- The option needs to be accepted by pupils/parents, teaching staff and the wider community.

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- There must be the teaching capacity, skills and vision to deliver the required outcomes, or an awareness of the need to recruit assistance.
- Site development potential or achievability of land.

**CSF 5 – Supply side capacity and capability**

- Sufficient appropriate resources and expertise to be deployed within Carmarthenshire to achieve the investment objectives.
- Requirement for Innovative governance and management arrangements to be deployed, such as use of Non-Executive members of Programme Boards.

**CSF 6 – Potential affordability**

- The required investment can be met from the Welsh Government (21<sup>st</sup> Century Schools), plus contributions from Carmarthenshire County Council.
- Options can be phased to match the funds available, if required. Potential for economies of scale (through linkage with other schemes within the Council's MEP programme).

## 5. Commercial Case

**Highlight any differences to the Commercial Case since the latest version of your SOP/ Estates strategy was produced.**

**Please include details of what delivery models you are considering e.g. batching or single delivery.**

*1000 words maximum*

Carmarthenshire County Council has established the South West Wales Regional Contractors Framework with the following Lotting strategy: -

Lots 1 Carmarthenshire (£0 - £1m)

Carmarthenshire County Council; Neath Port Talbot County Borough Council; Pembrokeshire County Council, Ceredigion County Council & City & County of Swansea.

Lot 7 - West (£1m - £3.5m)

Carmarthenshire County Council; Neath Port Talbot County Borough Council; Pembrokeshire County Council, Ceredigion County Council & City & County of Swansea.

Lot 9 – West (£3.5m - £7.5m)

Carmarthenshire County Council; Neath Port Talbot County Borough Council; Pembrokeshire County Council, Ceredigion County Council & City & County of Swansea.

Lot 11 – West (£7.5m - £15m)

Schemes between £7.5 million to £15 million - Carmarthenshire County Council; Neath Port Talbot County Borough Council; Pembrokeshire County Council, Ceredigion County Council & City & County of Swansea.

Lot 12 - All Areas (£15m+)

Schemes in excess of £15 million - Carmarthenshire County Council; Neath Port Talbot County Borough Council; Pembrokeshire County Council, & Ceredigion County Council.

The South West Wales Regional Contractors Framework (SWWRCF) commenced in February 2016 and is due to expire in January 2020.

The framework allocation followed the OGC guidelines (EU rules and regulations) and used the OJEU notice board where relevant. The NEC 3 Engineering and Construction Contract Option A: Priced Contract with Activity Schedule and Option C: Target Contract with Activity Schedule were used to set up the Framework. The aim of the Framework is to provide high quality construction, related design and project management services to meet the Council's requirements whilst taking account of the principles of the 'Best Value' process and of 'Re-Thinking Construction'. The objectives are as follows:

- To provide and sustain an open, co-operative and business like culture between the parties;

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- To integrate public and private sector skills in delivering services;
- To have access to additional resources and expertise;
- To retain and promote core in-house skills;
- To promote continuous improvement;
- To create development opportunities for employees of both private and public sectors.

These forms of contract will also ensure that contractors are incentivised to provide the best value for money, through the inclusion of an element of gain share. Governance arrangements and a plan for future actions have been established. These initially focussed on the development of a regional procurement approach to support the delivery of schemes already announced in the bids, but are now focussing heavily on schemes within Band A of the 21st Century Schools Programme.

**Delivery Options**

Carmarthenshire's preferred option for delivery is to deliver projects in one phase:

This option assumes that all required services could be delivered within the initial phase(s) of the projects. This option strives to complete all school building works required at the same time.

**Advantages – The main advantages for this option are;**

- Large scale change initiated at the same time
- Minimises period of disruption
- Potential economies of scale arising from procurement
- Classrooms available for use immediately

This option is considered to be most advantageous strategically as it addresses the issues at schools sooner.

Where possible, the grouping or batching of projects will be considered where it makes commercial sense to do so.

## 6. Financial case

**Highlight any differences to the Financial Case since the latest version of your SOP/ Estates strategy was produced.**

**Please give details of the match funding arrangements for your Programme and confirm whether or not it is affordable.**

*1000 words maximum*

The delivery of the MEP to date has been made possible by the establishment of an innovative funding strategy for capital investment which has drawn upon and integrated a variety of funding sources.

The innovative approach to funding school modernisation applied by Carmarthenshire County Council remains fairly unique in Wales and has allowed the Authority to make significant progress in improving the quality of facilities at a number of schools, achieving progress at a much higher pace and on a greater scale than in most other areas.

Carmarthenshire's school development projects under the 21<sup>st</sup> Century Schools Programme are funded equally (50% Welsh Government / 50% Local Authority) by the Welsh Government and the County Council, subject to proposals being approved by the Welsh Government through business case submissions. Voluntary aided schools under paragraph 5 of Part 2 of Schedule 3 to the School Standards and Framework Act 1998, the Welsh Ministers (WM) have power to grant aid up to 85% of qualifying expenditure, with the governors themselves required to meet the remaining 15%.

The Authority has signified its agreement to the required level of funding most recently at Executive Board on the 20<sup>th</sup> June 2016 when the revised Modernising Education Programme and 21<sup>st</sup> Century Schools Band A Programme was given approval to pursue grant funding (from Welsh Government) for a number of schemes.

It has not been possible to receive this level of endorsement for a Band B programme as yet. The Band B information will shortly be taken through the democratic process and presented to Executive Board (Cabinet) on 18<sup>th</sup> December 2017. If approved at the level included within this submission, the Authority will be able to confirm its match funding arrangements for both capital and revenue elements at that time.

## 7. Management Case

**Highlight any differences to the Management Case since the latest version of your SOP/ Estates strategy was produced.**

*1000 words maximum*

**Since the submission of the previous SOP please see below our updated project management arrangements.**

The programme of work will be managed in accordance with PRINCE2 methodology and MSP principles.

### **Governance**

Programme Board is ultimately responsible for ensuring that the projects remain on course to deliver the desired investment objectives of the required quality to meet the Modernising Education and Communities Programme (MECP) agenda.

The MECP Programme Board is supported by the separate MEP and MCP Project Delivery Boards to ensure successful delivery of projects.

### **Terms of Reference**

- Provide overall guidance and direction of the MEP and MCP
- Ensure all Council services are co-ordinated to maximise the benefits to MEP/MCP projects
- Ensure MEP/MCP projects are delivered on time and on budget
- Ensure financial risks to the Authority are effectively managed
- Ensure a holistic view is taken on the implications for modernisation on all services
- Resolve strategic and directional issues between MEP/MCP projects
- Decide on recommendations from MEP and MCP Project Delivery Boards to progress to the next stages of delivery
- Decisions on reorganisation to be made by the County Council in line with Strategy agreed by full Council
- E&CS and Community Scrutiny Committees to scrutinise progress reports twice per year
- Recommend policy changes that are needed to enable transformation to proceed

### **Membership**

The MECP Programme Board will be ultimately responsible for supporting Education & Children and Communities Senior Responsible Officers (SROs) and ensure that the projects remain on course to deliver the desired investment objectives.

Programme Board members have been selected as those best placed to support the programme and consists of officers with the responsibility for various subject areas.

## **MEP Project Delivery Board**

### **Terms of Reference**

- Responsible for the management and delivery of MEP projects.
- Confirm Project tolerances with Programme Board
- Provide overall guidance and direction to MEP Projects ensuring they remain within specified constraints
- Ensure compliance with corporate or programme management directives
- Ensure all issues and risks are identified and reported to Programme Board
- Support the Programme Board in ensuring that the MEP is delivered on time and within budget
- Identify policy changes that are needed to enable transformation to proceed
- Ensure all Council services are co-ordinated to maximise the benefits to MEP projects
- Quantify the implications for modernisation on all services

### **Operation**

- Other issues such as IT, transport and catering are being included in detailed design meetings with Environment Department staff, and for every project a task and finish team will focus on the detailed delivery at the operational level
- The team will meet monthly
- Papers will be circulated a week in advance of each meeting
- Concise action notes and action log will be circulated within a week of each meeting
- Additional expertise may be co-opted for specific meetings as the agenda dictates
- Regular reports will be made to the Programme Board

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**Please provide details of the structures in place to deliver the projects within your Programme and contact details of the core team.**

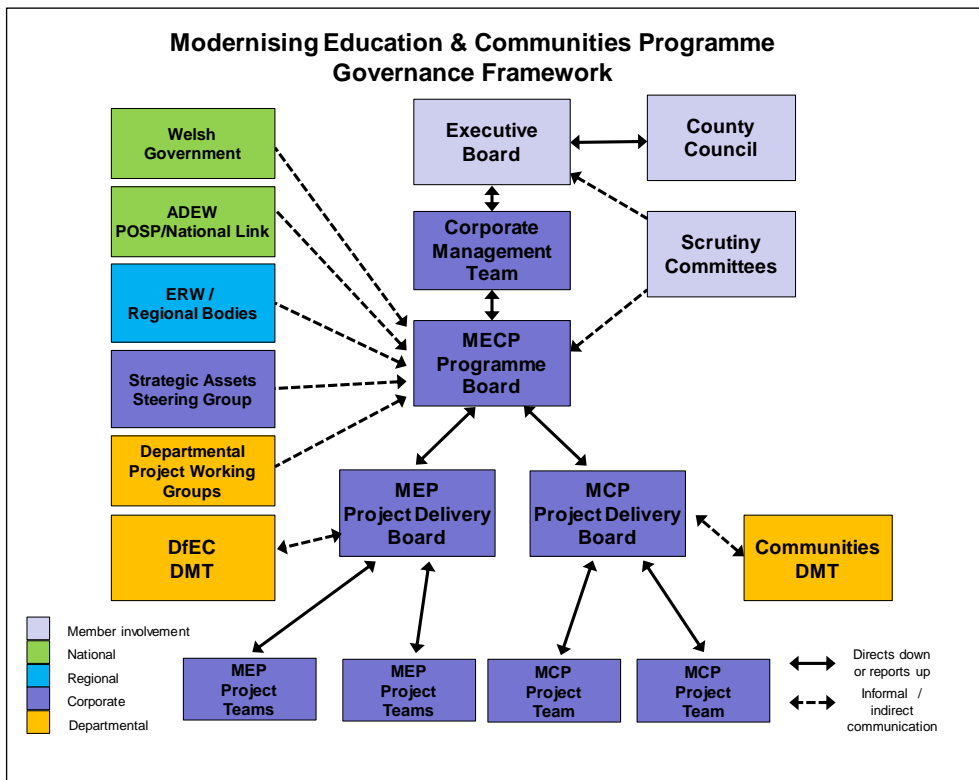
*500 words maximum / organogram*

**Governance**

Programme Board is ultimately responsible for ensuring that the projects remain on course to deliver the desired investment objectives of the required quality to meet the Modernising Education and Communities Programme (MECP) agenda.

An MECP Governance framework and outline reporting and communication structure is provided below:

**Project Management Arrangements**



**Programme Board Membership**

<b>Job Title</b>	<b>Role</b>
Director of Environment	Chair
Director of Education & Children's Services	MEP Programme Sponsor (SRO)
Director of Community Services	MCP Programme Sponsor (SRO)
Director of Corporate Services	Finance



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Assistant Chief Executive	Human Resources
Head of Leisure	Communities
Head of Education Services	Education
Head of Property	Asset Review, Estate Management, Construction & Maintenance
Head of Transportation & Highways	Transport
Property and Major Projects Manager	Acquisitions & Disposals
Economic Development Manager	Economy
Property Design & Projects Manager	Property Construction
Modernisation Services Manager	Programme Manager

**Project Delivery Board**

Project Delivery Board members are selected as those best placed to support the Director of Education and Children’s Services as Senior Responsible Officer (SRO) for the Programme. The following officers will be standing members of the Board:

**Project Delivery Board Membership**

<b>Job Title</b>	<b>Role</b>
Modernisation Services Manager	Programme Manager (PM)
Property Design & Projects Manager	Development & Construction
Strategy and Implementation Manager	Transport and Engineering
Group Accountant	Capital and Revenue Funding
School Development Project Officers	Project Manager
Project Delivery, Design & Cost Control Team Leaders	Construction Project Delivery & Cost Managers
Senior Business Partner (HR)	Human Resources

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Operations Manager – Passenger Transport	Transport	
Principal Challenge Adviser	Education Standards	
Valuations Manager	Asset Review, Estate Management, Acquisitions & Disposals	
Area Building Manager	Building Maintenance	



## 8. Application for Mutual Investment Model (MIM) funding

<p><b>Do you intend to deliver any of your Band B projects using the Mutual Investment Model?</b> <i>Delete as appropriate</i></p>	Yes
--	-----

If:

- **No** - please move to the next **Section 10**
- **Yes** - please complete the relevant section for local authorities or further education institutions below.

### (a) Local Authorities

Schools		Number	Size	Cost – based on WG guidance
Please indicate how many school buildings you would use this funding for:	Primary	4	1 x 420 + 60 1 x 330 + 45 1 x 350 + 50 1 x 210 + 30	£25m
	Secondary	0		
	Total	4	770	£25m

**Please provide brief details including title and estimated capital cost of the project/s.**

*1000 words maximum*

#### **Llandeilo Area Primary**

##### **Estimated Capital Cost – £10,000,000**

Investment to replace 3 existing Welsh medium primary schools in condition B, C and C with 1 x 330 + 45 Welsh medium Primary School.

Investment to replace 1 existing English medium primary school in condition C with 1 x 210 + 30 English medium Primary School.

#### **Ammanford Area Primary**

##### **Estimated Capital Cost – £15,000,000**

Investment to replace 2 existing Welsh medium primary school in condition A and B, with 1 x 420 + 60 Welsh Medium Primary School.

Investment to replace 1 dual stream primary school in condition B with 1 x 350 + 50 Dual Stream Primary School introducing a Welsh medium foundation phase

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with option at year 3 to choose a Welsh or English stream. ALN provision will be included within the project.

**(b) Further Education Institutions**

**Colleges**

**Please provide brief details of your college project(s), together with the estimated capital cost using the Welsh Government capital rate per m<sup>2</sup>.**

**Please give details of the extent of the works planned e.g. campus, block replacement, extension and the type of facilities e.g. construction, hairdressing and beauty.**

*1000 words maximum*

**Not Applicable**

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**9. Band B Projects**

<b>How many projects do you intend to deliver in Band B?</b>	<b>19</b>
--	-----------

**What are they? (Please note that details of the projects should also be included in the attached table). The projects should be ranked in both documents in order of priority.**

*500 words maximum*

Carmarthenshire’s Band B order of priority of projects together with a brief description of the project is provided below.

<b>Investment Projects</b>		
<b>Priority</b>	<b>Project</b>	<b>Brief Description</b>
1.	<b>Pupil Referral Unit (PRU)</b>	Relocate PRU to remodelled accommodation next to a Secondary school following the relocation of a primary school due to be relocated to a new site in Band A of the programme.
2.	<b>Llandeilo Area</b>	Review the future provision of education in the area served by the schools.  Statutory approvals required.
3.	<b>Ammanford Area</b>	(Ammanford Nursery, Bro Banw, Gymraeg Rhydaman) – Review the future provision of education in the area served the schools. Statutory approvals required (Partially completed with the creation of Bro Banw).
4.	<b>Penygaer</b>	Invest to remodel existing premises.
5.	<b>Carmarthen West</b>	New School premises.
6.	<b>Kidwelly</b>	Review the future provision of education in the area served the schools.  Statutory approvals required for welsh medium provision.
7.	<b>Pembrey</b>	New School premises.
8.	<b>Five Roads</b>	New School premises.
9.	<b>Hendy</b>	Invest to remodel existing premises.
10.	<b>Llanybydder / Llanllwni</b>	Review the future provision of education in the area served existing schools.  Statutory approvals required.

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11.	<b>Gwendraeth Valley North</b>	Review the future provision of education in the area served the existing schools.  Statutory approvals required.
12.	<b>Cross Hands Area</b>	Review the future provision of education in the area served the existing schools.  Statutory approvals required.
13.	<b>Gwendraeth Valley Central</b>	Review the future provision of education in the area served the existing schools.  Statutory approvals required.
14.	<b>Llandybie</b>	Invest to remodel existing premises.
15.	<b>Heol Goffa</b>	New Special School premises.
16.	<b>Bro Myrddin</b>	Invest in existing school site to increase capacity due to growing demand.
17.	<b>Myrddin</b>	Invest to remodel existing premises.
18.	<b>Behavioural Support Hubs</b>	Develop remodelled outreach service and local delivery from inclusion hubs at selected Secondary Schools. Current Behaviour Services Review to make recommendations.
19.	<b>Bryngwyn</b>	Invest in existing school site.

## 10. Bands C and D

**Please provide an update for Bands C and D of your Programme.**  
**[Band C will run from April 2024- March 2029; Band D will run between April 2029 and March 2034].**

### **Band C**

*500 words maximum*

Since the original SOP Carmarthenshire's Modernising Education Programme (MEP) has been reviewed and updated three times (2011, 2013 and 2016).

In the latest iteration all reference to Bands B, C and D were removed and replaced by 'Future Programme'.

Other than the projects now identified for this Band B submission, the future programme consists of 27 primary and secondary school projects with an estimated cost of £123m.

### **Band D**

*500 words maximum*

Please see Band C box above.



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**11. Statement of Approval for Strategic Outline Programme (SOP) -  
Band B Update – July 2017**

Please complete as appropriate:

I confirm that the updates in this form have been signed off by either the Cabinet of the local authority or the Board of the further education institution:

<b>Local Authority / College</b>	Carmarthenshire
<b>Name <i>Printed</i></b>	Simon Davies
<b>Name <i>Signed</i></b>	
<b>Position in the organisation</b>	Modernisation Services Manager
<b>Date DD/MM/YYYY</b>	25/07/2017

If there has not yet been sign off at Cabinet or Board level, please confirm when this is anticipated. Please also confirm at what level the document has currently been signed off.

The information contained above has **NOT** been signed off by the Authority's Executive Board.

The information will be taken through the Authority's Democratic Process and considered by the Executive Board on 18<sup>th</sup> December 2017.

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Carmarthenshire Band B - Project Details													Schools associated with the scheme								
New School Name	School Number (If known)	Education Level	Governance - see notes	Welsh Medium Type - see notes	PRU - No. of places	SEN - No. of places	Project Type	Total Project Cost (Please enter full value: £0,000,000)	Assumed Local Authority Funding %	Proposed Area (m2)	Land Ownership	No.	School Name	Current Capacity	Current Pupils on Roll * from JAN 16 POSP	Condition	Sufficiency Rating	Suitability	Free School Meals	Consultation Comments	General Project Comments
1	PRU	6692189	Other	Not Applicable	Not applicable	42	New Build / Refurb	£5,000,000	50%	TBC	LA Education	1	Carmarthenshire Teaching and Learning Centre, Bu	42	32	C	Y	B	>19%	No statutory process anticipated as part of this proposal	Relocation of the PRU to a permanent site
2	Llandeilo Area	TBC	Primary	Community	1 x Welsh Medium 1 x Dual Stream	TBC	New Build / Refurb	£10,000,000	50%	TBC	LA Education	1	Talley	62	35	C	Y	B	12-19%	A review of both Welsh & English Medium primary provision to be undertaken. Statutory process required to reorganise primary provision.	Proposed investment for primary schools in Llandeilo area
												2	Teilo Sant	211	187	C	Y	C	<12%		
												3	Llandeilo	252	199	C	Y	B	>19%		
												4	Ffairfach	90	95	B	Y	B	<12%		
3	Ammanford Area	TBC	Primary	Community	1 x Welsh Medium 1 x Dual Stream	94 - TBC	New Build / Refurb	£15,000,000	50%	TBC	LA Education + Other	1	Bro Banw	490	401	B	Y	A	>19%	A review of both Welsh & English Medium primary provision to be undertaken. Statutory process required to reorganise primary and nursery provision.	Land acquisition required. Increase SEN pupil places proposed by introducing Welsh medium provision.
												2	Gymraeg Rhydaman	210	253	A	N	B	<12%		
												3	Ammanford Nursery		80	B	Y	A	>19%		
												4	Betws	104	68	B	Y	B	>19%		
4	Penygaer	6692190	Primary	Community	English medium	TBC	Refurbishment	£6,000,000	50%	TBC	LA Education	1	Penygaer	233	221	B	Y	B	>19%	No statutory process anticipated as part of this proposal	Scheme reliant on completion of Dewi Sant Band A Project.
5	Carmarthen West	TBC	Primary	Community	TBC	TBC	New Build - Whole School	£10,000,000	50%	TBC	New site	1	New School	N/A	N/A	N/A	N/A	N/A	N/A	A review of both Welsh & English Medium Carmarthen Town primary schools to be undertaken.	New school on new site to facilitate large increase in housing developments.
6	Kidwelly	6692370 / 6692192	Primary	Community	Welsh Medium / English Medium	TBC	New Build / Refurb	£13,000,000	50%	TBC	LA Education + Other	1	Gwenllian	126	111	B	N	B	12-19%	Statutory process required for Welsh Medium provision.	To be implemented as tow separate projects
												2	Mynyddygarreg	49	29	C	Y	A	>19%		
												3	Y Castell	244	248	B	Y	B	>19%		
7	Pembrey	6692178	Primary	Community	English medium	TBC	New Build - Whole School	£7,500,000	50%	TBC	LA Education	1	Pembrey	240	234	D	Y	B	>19%	No statutory process required as part of this proposal	Replacement of existing school in poor condition.
8	Five Roads	6692128	Primary	Community	Welsh medium	TBC	New Build - Whole School	£5,000,000	50%	TBC	LA Education + Other	1	Five Roads	101	90	C	N	C	12-19%	No statutory process required as part of this proposal	Land being aquired in preparation for school develoment.
9	Hendy	6692131	Primary	Community	Dual Stream	TBC	Extension	£5,000,000	50%	TBC	LA Education	1	Hendy	178	144	B	Y	B	12-19%	Proposed closure of one primary as part of this proposal	Increase the capacity of a primary school to accommodate additional pupils and improve building condition.
												2	Llanedi	39	16	C	Y	C	12-19%		
10	Llanybydder/Llanllwni	6692184	Primary	Community	Welsh medium	TBC	Extension	£1,000,000	50%	TBC	LA Education	1	Llanybydder	90	83	B	Y	B	<12%	A review of primary provision to be undertaken.	Increase the capacity of a primary school to accommodate additional pupils and improve building condition.
												2	Llanllwni	42	33	C	Y	C	>19%		
11	Gwendraeth Valley North	TBC	Primary	Community	Welsh medium	TBC	New Build - Whole School	£4,000,000	50%	TBC	LA Education	1	Cefneithin	85	66	C	Y	C	12-19%	An area review of primary provision to be undertaken.	Reorganisation and investment proposed subject to the conclusions of the review.
												2	Drefach	71	46	C	Y	B	12-19%		
												3	Llanddarog VC	83	86	C	Y	C	<12%		
12	Cross Hands	6692008	Primary	Community	Welsh medium	TBC	New Build - Whole School	£4,000,000	50%	TBC	LA Education	1	Cross Hands	169	109	C	Y	B	12-19%	An area review of primary provision to be undertaken.	Reorganisation and investment proposed subject to the conclusions of the area review.
13	Gwendraeth Valley Central	TBC	Primary	Community	Welsh medium	TBC	New Build - Whole School	£6,000,000	50%	TBC	Other	1	Carway	111	44	B	Y	B	>19%	A review of primary provision to be undertaken.	Reorganisation and investment proposed subject to the conclusions of the area review.
												2	Gwynfryn	65	64	B	Y	B	>19%		
												3	Pontiets	76	48	C	Y	B	>19%		
												4	Ponthenri	72	62	C	Y	B	>19%		
14	Llandybie	6692181	Primary	Community	Welsh Medium	TBC	New Build / Refurb	£5,000,000	50%	TBC	LA Education	1	Llandybie	216	177	B	Y	A	12-19%	No statutory process required as part of this proposal	Improve school condition
15	Heol Goffa	6697010	Other	Other	English medium	TBC	New Build - Whole School	£10,000,000	50%	TBC	Other	1	Heol Goffa	85	86	B	Y	A	N/A	No statutory process required as part of this proposal	Provide modern accomodation and facilities
16	Bro Myrddin	6694056	Secondary	Community	Welsh medium	TBC	Extension	£6,000,000	50%	TBC	LA Education	1	Bro Myrddin	923	867	B	N	B	<12%	No statutory process required as part of this proposal	Provide additional accomodation
17	Myrddin	6692171	Primary	Community	English medium	TBC	Extension	£3,000,000	50%	TBC	LA Education	1	Myrddin	135	66	C	Y	B	>19%	TBC	Improve school condition
18	Behavioural Support Hubs (Secondary)	N/A	Secondary	Community	All Secondary Schools	TBC	Extension/Refurbishment	£8,000,000	50%	TBC	LA Education	1	All Secondary Schools	TBC	N/A	N/A	N/A	N/A	N/A	TBC	Investment to create a behavioural support hub at 3 secondary schools in the county Investment to include making all secondary schools more self sufficient in terms of behavioural support
19	Bryngwyn	669	Secondary	Community	English medium	TBC	Extension Refurbishment	£6,000,000	50%	TBC	LA Education	1	Bryngwyn School	1100	997	C	C	C	TBC	No statutory process required as part of this proposal	Investment to improve schools dining area

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## EXECUTIVE BOARD 18<sup>TH</sup> DECEMBER 2017

### MODEL TEACHERS' PAY POLICY 2017/18

#### Recommendations / Key Decisions Required:

To endorse the Model Teachers' Pay Policy 2017/18 prior to circulation to Schools for formal adoption by their Governing Bodies.

#### Reasons:

The Model Teachers Pay Policy has been updated to reflect legislative changes introduced by the School Teachers Pay and Conditions Document 2017.

Relevant Scrutiny Committee to be consulted	NO
Executive Board Decision Required	YES
Council Decision Required	NO

#### EXECUTIVE BOARD MEMBER PORTFOLIO HOLDER:

Cllr. Mair Stephens; Cllr. Glynog Davies

Name of Head of Service:	Designations:	Tel Nos.: E-Mail Addresses:
Paul R. Thomas	Assistant Chief Executive (People Management)	01267 246123 <a href="mailto:PRThomas@sirgar.gov.uk">PRThomas@sirgar.gov.uk</a>
Gareth Morgans	Interim Director of Education & Children's Services	01267 224888 <a href="mailto:EDGMorgans@sirgar.gov.uk">EDGMorgans@sirgar.gov.uk</a>
<b>Report Author:</b> Julie Stuart	Senior Business Partner (HR)	01267 246375 <a href="mailto:JStuart@sirgar.gov.uk">JStuart@sirgar.gov.uk</a>

# EXECUTIVE SUMMARY

## EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

### MODEL TEACHERS' PAY POLICY 2017/18

#### 1. BRIEF SUMMARY OF PURPOSE OF REPORT

All schools are required to adopt a pay policy that sets out the basis on which it determines teachers' pay and the date by which it will determine the teachers' annual pay review and also establish procedures for addressing teachers' grievances in relation to their pay. The document called School Teachers Pay and Conditions (STP&CD) is updated each year which can lead to amendments in the model pay policy offered to schools.

This revised model Pay Policy has been updated to reflect legislative changes introduced in the STP&CD on 1<sup>st</sup> September 2017. The HR Group of the Education Regional Working (ERW) Consortium has updated the current Pay Policy to be offered to all schools across the region. The ERW Consortium consists of the following County Councils, Carmarthenshire, Ceredigion, Neath & Port Talbot, Pembrokeshire and Powys and City of Swansea.

Teaching associations have been fully consulted and have agreed the Model Teachers' Pay Policy 2017/18, both regionally and locally.

The ERW region developed a regional model Teachers' Pay Policy which it can distribute to schools for consideration and adoption by governing bodies. This policy encompasses the changes to teachers' pay arrangements as outlined in the STPCD 2017 and will assist in achieving a high level of consistency across the region.

Each Local Authority is going through their individual Council process for endorsement of the policy and ERW advice to all schools is not to do anything further about introducing a new pay policy until the final model pay policy is released by the Director of Education & Children's Services. This will be done as soon as possible but is likely to be December 2017.

**DETAILED REPORT ATTACHED?:**

**NO**

## IMPLICATIONS

Policy, Crime & Disorder & Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
<b>YES</b>	<b>YES</b>	<b>NONE</b>	<b>NONE</b>	<b>YES</b>	<b>YES</b>	<b>NONE</b>
<p><b>1. Policy, Crime &amp; Disorder</b></p> <p>The document called School Teachers Pay and Conditions (STPCD) is updated each year which can lead to amendments in the model pay policy offered to schools.</p>						
<p><b>2. Legal</b></p> <p>The Model Teachers' Pay Policy has been updated to reflect legislative changes introduced by the School Teachers Pay and Conditions Document 2017.</p>						
<p><b>3. Finance</b></p> <p>No corporate financial implications as the schools have their own delegated budget.</p>						
<p><b>5. Risk Management Issues</b></p> <p>The schools are statutorily bound to have a pay policy in place.</p>						
<p><b>6. Staffing Implications</b></p> <p>The HR Team will provide advice and guidance to schools on the application of the Model Teachers' Pay Policy 2017/18 as required.</p>						

## CONSULTATIONS

I confirm that the appropriate consultations have taken place and the outcomes are as detailed below:

Signed: \_\_\_\_\_



**ASSISTANT CHIEF EXECUTIVE (PEOPLE MANAGEMENT)**

1. **Scrutiny Committee:** None
2. **Local Member(s):** None
3. **Community / Town Council:** None
4. **Relevant Partners:** None
5. **Staff Side Representatives and other Organisations:**  
 ERW HR / TU Forum - 2<sup>nd</sup> October 2017;  
 HR / TU Policy Development Meeting - 26<sup>th</sup> October 2017

**Section 100D Local Government Act, 1972 - Access to information**  
**List of Background Papers used in the preparation of this report:**

THERE ARE NONE

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Ein Rhanbarth ar Waith  
Education through Regional Working

# Model Teachers' Pay Policy 2017/2018

Cynghrair o 6 awdurdod lleol yw ERW a reolir gan gyd-bwyllgor cyfansoddiadol cyfreithiol.  
Y nod yw gweithredu strategaeth a chynllun busnes rhanbarthol cytunedig a chefnogi gwelliant ysgolion.

ERW is an alliance of 6 local authorities governed by a legally constituted joint committee.  
Its aim is to implement the agreed regional strategy and business plan to support school improvement.



<b>DOCUMENT CONTROL</b>	
<b>Policy Name</b>	Teachers' Pay Policy 2017/18
<b>Department</b>	Human Resources
<b>Reviewing Officers</b>	ERW HR Group on behalf of the 6 constituent Local Authorities
<b>CONSULTATION PROCESS</b>	
<p>The following Trade Unions have been consulted in respect of this Policy:</p> <ul style="list-style-type: none"><li>• ASCL</li><li>• NAHT</li><li>• NASUWT</li><li>• NEU</li><li>• UCAC</li></ul>	

## MODEL TEACHERS' PAY POLICY 2017/18

The Governing Body of \_\_\_\_\_ School  
formally adopted this Policy on \_\_\_\_\_ .

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**1. INTRODUCTION**

- 1.1. This Pay Policy provides a framework for making decisions on Teachers' pay. It has been developed to comply with the requirements of the School Teachers Pay and Conditions Document (STPCD) and has been subject to consultation with all recognised Teaching Associations.

**2. STATEMENT OF INTENT**

- 2.1. The primary statutory duty of Governing Bodies in Wales, as set out in paragraph 21(2) of the Education Act 2002 is to '...conduct the school with a view to promoting high standards of educational achievement at the school'. This Policy intends to support that statutory duty.
- 2.2. The procedures for determining pay in this School will be consistent with the principles of public life: objectivity, openness and accountability.
- 2.3. The Governing Body will act with integrity, confidentiality, objectivity and honesty in the best interest of the School in relation to the operation of this Policy.
- 2.4. The Governing Body will be open about pay decisions made and actions taken, and will be prepared to explain decisions and actions to the interested persons.
- 2.5. Any future revisions to this policy will comply with the STPCD and will be subject to consultation with relevant parties, including recognised trade unions.

**3. EQUALITIES LEGISLATION**

- 3.1. The School is committed to ensuring equality in everything that we do. The Equality Act 2010 has replaced and strengthened previous equality legislation. The Governing Body will comply with all relevant equalities legislation.
- 3.2. This Policy will be applied consistently to all employees irrespective of age, disability, race, gender (sex), gender reassignment, marriage / civil partnership, pregnancy / maternity, religion, belief and sexual orientation.
- 3.3. The Governing Body will promote equality in all aspects of school life, particularly in relation to all decisions on the advertising of posts, appointing, promoting and paying staff, training and staff development.

**4. EQUALITIES AND PERFORMANCE-RELATED PAY**

- 4.1. The Governing Body will ensure that pay processes are transparent and fair. All decisions made will be objectively justified and recorded. Reasonable adjustments will be made on a case by case basis to take account of individuals' circumstances such as long-term absence on the grounds of maternity or ill-health

**5. JOB DESCRIPTIONS**

- 5.1. The Headteacher will ensure that each member of staff is provided with a job description in accordance with the School's staffing structure (**see Appendix 10**), as agreed by the Governing Body.

**6. APPRAISALS**

- 6.1. The Governing Body will comply with the School Teacher Appraisal (Wales) Regulations 2011 concerning the appraisal of Headteachers and Teachers through the application of the School's Performance Management Policy.

**7. GOVERNING BODY'S OBLIGATIONS**

- 7.1. The Governing Body will:

- Fulfil its obligations as set out in the STPCD and the Conditions of Service for School Teachers in England and Wales (the 'Burgundy Book');
- establish a Pay Committee and Pay Appeals Committee;
- determine all pay progression decisions, taking account of recommendations from the Headteacher;
- ensure that it makes funds available to support pay decisions, in accordance with this Pay Policy and the School's spending plan;
- ensure that Teachers, via the Headteacher, are informed about pay decisions which affect them, and that records are kept of recommendations and decisions made; and
- monitor, on an annual basis, the outcomes of pay decisions, including the extent to which different groups of Teachers may progress at different rates. The outcome of the review will be shared with school-level trade union representatives.

**8. HEADTEACHER'S OBLIGATIONS**

- 8.1. The Headteacher will:

- ensure that all appraisers (where not the Headteacher,) provide accurate, relevant, complete and timely information about pay recommendations;
- moderate performance assessments and initial pay recommendations to ensure consistency and fairness;
- submit pay recommendations to the Pay Committee and ensure the Pay Committee has relevant information upon which to make pay decisions;

- inform Teachers about the School's Pay Policy and ensure its accessibility;
- notify payroll and/or HR staff within the Local Authority about pay decisions to be implemented; and
- ensure that a report on the operation of the Pay Policy is presented to the Governing Body and the relevant Trade Unions on an annual basis.

### **9. TEACHERS' OBLIGATIONS**

#### 9.1. Teachers will:

- familiarise themselves with the provisions of this Pay Policy, the STPCD, the relevant professional standards and all relevant school employment policies; and
- engage positively with the processes set out in this Policy

### **10. DIFFERENTIALS**

- 10.1. Within the framework of the STPCD, appropriate differentials will be created and maintained between posts within the School, recognising accountability and job weight, and the Governing Body's need to recruit and retain sufficient Teachers of the required quality at all levels.

### **11. SAFEGUARDING**

- 11.1. Where a pay determination leads, or may lead, to the start of a period of safeguarding, the Governing Body will comply with the relevant provisions of the STPCD and will give the required notification as soon as possible and within no later than one month after the determination.

### **12. CAPABILITY AND PAY PROGRESSION**

- 12.1. Where a Teacher's performance has been assessed as being unsatisfactory and the Teacher is subject to the School's Capability Procedure, the School's performance management processes will be suspended in relation to the Teacher concerned until the Capability Procedure has been concluded.
- 12.2. On conclusion of the Capability Procedure, the Teacher will resume performance management processes in accordance with the School's Policy.
- 12.3. Pay progression will not be permissible in accordance with this Pay Policy while a Teacher is subject to the School's Capability Procedure.
- 12.4. On conclusion of the Capability Procedure, the Teacher would re-enter the Performance Management cycle.

- 12.5. Pay progression will not be applied retrospectively in any case of capability.

### **13. PAY DETERMINATION**

- 13.1. The Governing Body has delegated its pay determination powers to the Pay Committee.

#### **13.2. Annual Determination of Pay**

- 13.2.1. All teaching staff salaries, including those of the leadership group, will be reviewed annually to take effect from 1<sup>st</sup> September. The Governing Body will conclude Teachers' annual pay reviews, and assessments of applications to progress to the Upper Pay Range, by 31<sup>st</sup> October; the Headteacher's annual pay review will be concluded by 31<sup>st</sup> December.
- 13.2.2. Reviews may take place at other times of the year to reflect, for example, any changes in circumstances, changes in a job description that lead to a change in the basis for calculating an individual's pay and in cases where a Teacher resumes performance management arrangements following capability processes.
- 13.2.3. The Governing Body will apply any future national pay awards as specified by the STPCD.

#### **13.3. Notification of Pay Determination**

- 13.3.1. A written statement will be given to each Teacher setting out the pay and any other financial benefits to which they are entitled following a determination. Where applicable, this will include information about the basis on which it was made. This will be done by 31<sup>st</sup> October for Teachers, 31<sup>st</sup> December for Headteachers, or by no later than one month following the determination.

#### **13.4. Appeals Procedure**

- 13.4.1. The Governing Body has an appeals procedure in relation to pay. This is set out in **Appendix 8** of this Pay Policy.

### **14. HEADTEACHER PAY**

- 14.1. The Governing Body will ensure that the process of determining the remuneration of the Headteacher is fair and transparent.
- 14.2. The Governing Body will assign a seven-point leadership pay range which can be reviewed as necessary for the Headteacher based on the school group size and any permanent additional relevant factors as determined within the framework of the STPCD (specifically paragraphs 9.2, 9.3 and 9.4).
- 14.3. Additional factors to be taken into account will include all permanent responsibilities of the post, challenges specific to the role and all other relevant considerations, alongside any factors relating to recruitment and retention.

## MODEL TEACHERS' PAY POLICY 2017/18

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- 14.4. The Governing Body may re-determine the Headteacher's pay range if it becomes necessary to change the Headteacher group (including where the Headteacher becomes responsible and accountable for more than one school in a federation on a permanent basis). The Headteacher's pay range may also be reviewed at any time if it considers it necessary to reflect a significant change in the responsibilities of the post.
- 14.5. Payments in respect of temporary responsibilities for the Headteacher will not be included in the pay range but will be determined in accordance with the STPCD as explained in **Appendix 6**.
- 14.6. In this School, the Governing Body will apply discretionary reference pay points for leadership pay as indicated in **Appendix 1** and has agreed a seven step pay range of L xxx to L xxx (*details to be inserted here by the school*).

### 14.7. Pay on Appointment

- 14.7.1. For new appointments, the Governing Body will determine the leadership pay range to be advertised and will agree the starting pay on appointment, taking account of the full role of the Headteacher and the provisions of the STPCD.
- 14.7.2. The Governing Body will adopt a three-stage process when setting the pay for new Headteacher appointments as set out in **Appendix 6**.
- 14.7.3. The Pay Committee will review the School's Headteacher group and the Headteacher's leadership pay range, as necessary, to ensure fair pay relativities within the School.
- 14.7.4. See **Appendix 6** of this Pay Policy for guidelines on leadership pay ranges and **Appendix 7** for the Annual Review Pay Statement.

## 15. DEPUTY / ASSISTANT HEADTEACHER PAY

- 15.1. In this School, the Governing Body will use the discretionary reference pay points for leadership pay as indicated in **Appendix 1**.
- 15.2. The Governing Body will assign a five-point leadership pay range which can be reviewed as necessary for Deputy / Assistant Headteacher posts based on the school group size and any permanent additional relevant factors as determined within the framework of the STPCD.
- 15.3. The range for individual posts will be determined according to the duties and responsibilities of the post and may vary between posts.
- 15.4. In this School, the Deputy Headteacher five step pay range is L xx to L xxx (*pay details to be inserted here by the school*).
- 15.5. In this School, the Assistant Headteacher five step pay range is L xx to L xxx (*pay details to be inserted here by the school*).



**15.6. Pay on appointment**

- 15.6.1. When a new appointment needs to be made, the Governing Body will determine the leadership pay range for the post to be advertised and will agree the starting pay on appointment.
- 15.6.2. The pay range will be determined in accordance with the STPCD.
- 15.6.3. The Governing Body will adopt the three-stage process when setting the pay for new appointments to the wider leadership team as set out in **Appendix 6**.

**16. PAY PROGRESSION FOR LEADERSHIP GROUP MEMBERS**

- 16.1. The Governing Body must consider annually whether or not to increase the salary of members of the leadership group who have completed a year of employment since the previous pay determination and, if it determines to do so, to what salary within the relevant pay range determined in accordance with the STPCD and the School Teachers Appraisal (Wales) Regulations 2011.
- 16.2. Leadership Group members will be awarded pay progression following a successful appraisal review. The review will be deemed to be successful where the member of staff has evidenced a sustained high quality of performance and has met, or has made significant progress towards meeting, his/her performance management objectives.
- 16.3. Competence in relation to the relevant standards will be taken into account as part of the School's performance management process.
- 16.4. A sustained high quality of performance on the part of the member of staff should give him/her an expectation of progression to the top of the relevant pay range, having always taken account of the recommendation made on the member of staff's performance management appraisal statement.
- 16.5. Where a member of staff's performance management objectives have not been met, or significant progress has not been made towards meeting the objectives, pay progression will not be awarded unless the Governing Body is satisfied that there are relevant extenuating circumstances. Where such a discretionary award of pay progression is made, this decision will be recorded accordingly.
- 16.6. In making its decision regarding pay progression, the Governing Body's Pay Committee will take account of the appraiser's recommendation regarding pay progression, as outlined on the member of staff's performance management appraisal statement.
- 16.7. The Pay Committee will record its decision regarding pay progression on the Annual Pay Review form contained at **Appendix 7**. A copy of this form will be provided to the member of staff.
- 16.8. Where pay progression is granted, the member of staff's salary will increase with effect from 1<sup>st</sup> September of the current academic year.

- 16.9. Where pay progression is not granted, the rationale for that decision will be recorded on the Annual Pay Review form. The member of staff has the right to appeal against any decision not to grant pay progression. The appeals procedure is set out in **Appendix 8**.

## **17. CLASSROOM TEACHER PAY**

### **17.1. Pay on Appointment**

- 17.1.1. Advertisements for vacant posts in the School will be considered by the Headteacher **[and the (*insert details of committee*) where appropriate]**. All posts will be advertised either internally or externally, locally or nationally as appropriate.
- 17.1.2. The advertisement will include details of the pay range and any additional payments or allowances applicable to the post.
- 17.1.3. The Governing Body will determine the starting salary of a vacant classroom Teacher post, in accordance with the Main Pay Range and Upper Pay Range, detailed at **Appendix 1**.
- 17.1.4. The Governing Body is committed to the principle of pay portability for Teachers **who are currently paid in accordance with the provisions of the STPCD** and will apply this principle in practice when making new permanent and fixed-term appointments.
- 17.1.5. The Governing Body will not restrict the pay range advertised, or starting salary and pay progression prospects available for classroom Teacher posts, other than the minimum of the Main Pay Range and the maximum of the Upper Pay Range.

### **17.2. Pay Progression for Existing Main Pay Range and Upper Pay Range Teachers**

- 17.2.1. The Governing Body must consider annually whether or not to increase the salary of Teachers (excluding NQTs undertaking their induction year) who have completed a year of employment since the previous pay determination and, if it determines to do so, to what salary within the relevant pay range determined in accordance with the STPCD and the School Teachers Appraisal (Wales) Regulations 2011.
- 17.2.2. A sustained high quality of performance on the part of the Teacher should give him/her an expectation of progression to the top of the relevant pay range, having always taken account of the recommendation made on the Teacher's performance management appraisal statement.
- 17.2.3. Teachers will be awarded pay progression following a successful appraisal review. The review will be deemed to be successful where the Teacher has evidenced a sustained high quality of performance and has met, or has made significant progress towards meeting, his/her performance management objectives.
- 17.2.4. Where a Teacher's performance management objectives have not been met, or significant progress has not been made towards meeting the objectives, pay progression will not be awarded unless the Governing Body is satisfied that there

are relevant extenuating circumstances. Where such a discretionary award of pay progression is made, this decision will be recorded accordingly.

- 17.2.5. Competence in relation to the relevant standards will be taken into account as part of the School's performance management process.
- 17.2.6. In the case of Teachers who are already on the Upper Pay Range, the Pay Committee will also take account of whether:
  - The Teacher has maintained the criteria for assessment to the Upper Pay Range (see **section 18.7** – 'Assessment', and **Appendix 2**); and
  - The Teacher continues to be highly competent in all elements of the relevant standards.
- 17.2.7. In making its decision regarding pay progression, the Governing Body's Pay Committee will take account of the appraiser's recommendation regarding pay progression, as outlined on the Teacher's performance management appraisal statement. The Pay Committee will be advised by the Headteacher in making all such decisions.
- 17.2.8. The Pay Committee will record its decision regarding pay progression on the Annual Teachers' Pay Review Statement contained at **Appendix 2**. A copy of this form will be provided to the Teacher.
- 17.2.9. Where pay progression is granted, the Teacher's salary will be increased with effect from 1<sup>st</sup> September of the current academic year.
- 17.2.10. Where pay progression is not granted, the rationale for that decision will be recorded on the Annual Teachers' Pay Review Statement. The Teacher has the right to appeal against any decision not to grant pay progression. The appeals procedure is set out in **Appendix 8**.

### **18. APPLICATIONS TO BE PAID ON THE UPPER PAY RANGE**

- 18.1. A qualified Teacher may apply once each year to be paid on the Upper Pay Range in accordance with the STPCD and this School's Pay Policy.
- 18.2. It is each Teacher's responsibility to decide whether to submit an application.
- 18.3. In order for the assessment to be robust and transparent, it will be an evidence based process.
- 18.4. Personal objectives for the forthcoming appraisal cycle will be set, and agreed where possible, at a level which is sufficient to ensure that the criteria included in the STPCD for progression to the Upper Pay Range can be met, including that the Teacher is highly competent in all elements of the relevant standards.
- 18.5. Teachers who have been absent from work for sickness, disability or maternity-related reasons, along with those who are not subject to the Appraisal Regulations

2011 (i.e. a Teacher who is employed on a short term contract of less than one term), may cite written evidence from a suitable and relevant period before the date of application in support of their application.

### 18.6. Process

18.6.1. The closing date for an application to be submitted by a Teacher to his / her appraiser is *(school to insert date here - normally prior to the end of the Summer Term)*.

18.6.2. Exceptions may be made in some specific circumstances, e.g. those Teachers who are on maternity leave or on sick leave as at the closing date for receipt of applications. In such circumstances, the Teacher may request - at least 2 weeks before the specified closing date - an extension of no more than half a term for the submission of an application.

18.6.3. The process for applications is:

- Teacher to inform appraiser in writing, within the required timescale (see paragraphs 16.7 and 16.8 above) that he / she wishes to be considered for progression to the Upper Pay Range and that his / her personal objectives for the forthcoming appraisal period should reflect this request.

Following completion of the relevant appraisal period:

- The appraiser will complete an assessment pro-forma as shown in **Appendix 4**, setting out the appraiser's recommendation in relation to progression to the Upper Pay Range, following completion of the relevant appraisal period;
- The Headteacher will consider the appraiser's recommendation and will make a recommendation to the Pay Committee;
- The Pay Committee will make a decision about pay progression, following receipt of advice from the Headteacher;
- The Teacher will receive written notification of the outcome of their application by 31<sup>st</sup> October in the relevant year;
- Where the application is unsuccessful, the written notification will set out details of the areas of the Teacher's performance which are not considered to have satisfied the relevant criteria set out in this Policy (see "Assessment" below);
- If requested, oral feedback will be provided by the Headteacher. Oral feedback will normally be given within 10 working days of the date of notification of the outcome of the application. Feedback will be given in a positive manner and will include advice and support about areas for improvement in order for the Teacher to meet the relevant criteria; and

- Successful applicants will move to step 1 of the Upper Pay Range with effect from 1<sup>st</sup> September of the academic year following their application being supported.

18.6.4. Unsuccessful applicants may appeal the decision as outlined in **Appendix 8**.

### **18.7. Assessment**

18.7.1. An application will only be successful where the Governing Body is satisfied that all of the requirements of the STPCD have been met, including that:

- the Teacher is highly competent in all elements of the relevant standards; and
- the Teacher's achievements and contribution to an educational setting or settings are substantial and sustained.

18.7.2. For the purposes of this Pay Policy, the Pay Committee will be satisfied that the Teacher has met the Governing Body's expectations for progression to the Upper Pay Range where the Upper Pay Range criteria (see **Appendix 3**) have been satisfied as evidenced by a successful appraisal review.

18.7.3. Further information, including details about sources of evidence, is contained in the School's Performance Management Policy.

## **19. LEADING PRACTITIONER ROLE**

19.1. The Governing Body may establish Leading Practitioner posts for Teachers whose primary purpose is the modelling and leading improvement of teaching skills.

19.2. Where the Governing Body wishes to establish such posts it will determine the responsibilities and pay range for these posts. Consultation with relevant staff and trade unions will take place in relation to any such proposed changes to the staffing structure.

19.3. The Policy of the Governing Body will be to appoint any new Leading Practitioner Teacher to a 5-point range, as deemed appropriate by the Governing Body.

19.4. The pay range for Leading Practitioners will be in accordance with the STPCD, which is currently a minimum of £39,374 per annum (i.e. Leadership Pay Point 1) and a maximum of £59,857 per annum (i.e. Leadership Pay Point 18).

19.5. In this School, the Governing Body will use the discretionary reference pay points detailed at **Appendix 1**.

19.6. Pay progression for Leading Practitioners will be determined as per the process set out at 17.2.1 to 17.2.10 above

**20. UNQUALIFIED TEACHERS**

- 20.1. A Teacher on the unqualified pay range will be paid an annual salary between £16,626 and £26,295 per annum. In this School, the Governing Body will use the discretionary reference pay points detailed at **Appendix 1**.
- 20.2. Under the Education (Specified and Registration) (Wales) Regulations 2010 there are specific circumstances when those other than qualified Teachers who are registered with the Education Workforce Council may carry out 'specified work'.
- 20.3. The School will comply with these legal requirements and will only employ unqualified Teachers as specified in these Regulations.
- 20.4. The Governing Body may pay an additional allowance to an unqualified Teacher who meets the criteria as defined in the STPCD.
- 20.5. In order to progress up the pay range, unqualified Teachers will need to show that they have met or made significant progress towards meeting their performance management objectives, along with demonstrating the required improvement in their teaching skills.
- 20.6. In making its decision regarding pay progression, the Governing Body's Pay Committee will take account of the appraiser's recommendation regarding pay progression, as outlined on the Teacher's performance management appraisal statement. The Pay Committee will be advised by the Headteacher in making all such decisions.
- 20.7. The Pay Committee will record its decision regarding pay progression on the Annual Teachers' Pay Review Statement contained at **Appendix 2**. A copy of this form will be provided to the unqualified Teacher.
- 20.8. Where pay progression is granted, the unqualified Teacher's salary will be increased with effect from 1<sup>st</sup> September of the current academic year.
- 20.9. Where pay progression is not granted, the rationale for that decision will be recorded on the Annual Teachers' Pay Review Statement. The Teacher has the right to appeal against any decision not to grant pay progression. The appeals procedure is set out in **Appendix 8**.
- 20.10. An unqualified Teacher who obtains qualified Teacher status will be paid on the pay ranges for qualified Teachers, in accordance with this Pay Policy.

**21. DISCRETIONARY ALLOWANCES AND PAYMENTS**

**21.1. Teaching and Learning Responsibility Payments (TLRs)**

- 21.1.1. The Governing Body will award TLR 1 and TLR 2 payments to post holders as indicated in the School's staffing structure (see **Appendix 10**).

## MODEL TEACHERS' PAY POLICY 2017/18

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- 21.1.2. These payments will be awarded to Teachers who undertake clearly defined and sustained additional responsibility in the context of the School's staffing structure for the purpose of ensuring the continued delivery of high quality teaching and learning and for which the Teacher is made accountable.
- 21.1.3. All job descriptions will be regularly reviewed and will make clear the responsibility or package of responsibilities for which a TLR is awarded.
- 21.1.4. The criteria for awarding a TLR 1 and TLR 2 payment will be in accordance with the STPCD.
- 21.1.5. The minimum and maximum range for a TLR 1 is £7,699 to £13,027 per annum.
- 21.1.6. The minimum and maximum range for a TLR 2 is £2,667 to £6,515 per annum.
- 21.1.7. In this School the value of TLRs currently in use is as follows
- TLR 1 - (details of each TLR 1 to be inserted here by school)**  
**TLR 2 - (details of each TLR 2 to be inserted here by school)**
- 21.1.8. The Governing Body may award a fixed-term TLR 3 payment to a Teacher of between £529 and £2,620 per annum for a clearly time-limited school improvement project, or one-off externally driven responsibilities.
- 21.1.9. The duration of the fixed term, and the amount of annual payment will be established at the outset and will be paid on a monthly basis.
- 21.1.10. Where the Governing Body wishes to make TLR 3 payments, the proposed responsibilities, level of payment and the duration of payment will be set out clearly following consultation with relevant staff and union representatives.
- 21.1.11. A Teacher in receipt of either a TLR1 or 2 may also hold a concurrent TLR3.
- 21.1.12. No safeguarding will apply in relation to an award of a TLR3.
- 21.1.13. A TLR1 or 2 payment awarded to a part time Teacher will be on a pro rata basis but where a TLR3 payment is awarded to a part time Teacher, the pro rata principle will **not** apply.

### **21.2. Special Educational Needs (SEN) Allowances**

- 21.2.1. The Governing Body will award SEN allowances in accordance with the criteria and provisions set out in the STPCD.
- 21.2.2. An SEN Allowance of no less than £2,106 per annum, and no more than £4,158 per annum, will be payable to a classroom Teacher in accordance with STPCD.
- 21.2.3. In this School, the SEN values are: **(details of each SEN Allowance / value to be inserted here by school)**

21.2.4. In deciding the SEN value, the Governing Body will take into account the structure of the School's SEN provision, whether any mandatory qualifications are required for the post, the qualifications or expertise of the Teacher relevant to the post, and the relative demands of the post.

### **21.3. Acting Allowances**

21.3.1. Acting allowances are payable to Teachers who are assigned and carry out the duties of Headteacher, Deputy Headteacher or Assistant Headteacher in accordance with the STPCD.

21.3.2. The Governing Body will, within a four-week period of the commencement of acting duties, determine whether or not the acting post holder will be paid an allowance. In the event of a planned and prolonged absence, an acting allowance may be agreed in advance and paid from the first day of absence.

21.3.3. Any Teacher who carries out the duties of Headteacher, Deputy Head, or Assistant Head, for a period of four weeks or more, will be paid at an appropriate point of the Head's pay range, Deputy Head pay range or Assistant Head pay range, as determined by the Pay Committee. Payment will be backdated to the commencement of the duties but will normally be paid a month in arrears.

21.3.4. Acting allowances may also apply to Teachers covering absent colleagues in receipt of a TLR and / or SEN allowance.

### **21.4. Additional Payments**

21.4.1. With exception of those on the leadership range the Governing Body may make additional payments to a Teacher, in respect of:

- continuing professional development undertaken outside the school day;
- activities relating to the provision of initial Teacher training as part of the ordinary conduct of the School;
- participation in out-of-school hours learning activity agreed between the Teacher and the Headteacher; and
- additional responsibilities and activities due to, or in respect of, the provisions of services by the Teacher relating to the raising of educational standards to one or more additional schools.

### **21.5. Recruitment or Retention Incentive Benefits**

21.5.1. The Governing Body can award lump sum payments, periodic payments, or provide other financial assistance, support or benefits for a recruitment or retention incentive. In deciding any such awards, the Governing Body will have regard to the STPCD and specialist HR advice.



- 21.5.2. Headteachers, Deputy Headteachers and Assistant Headteachers may not be awarded such a payment other than as reimbursement of reasonably incurred housing or relocation costs.
- 21.5.3. All other recruitment and retention considerations in relation to a Headteacher, Deputy Headteacher or Assistant Headteacher post will be taken into account when determining the pay range.
- 21.5.4. The reason for the award of any additional payment, the expected duration of any such incentive or benefit, and the review date after which they may be withdrawn will be made clear at the outset, in writing.
- 21.5.5. The Governing Body will conduct an annual review of all such awards.

## **22. PART-TIME TEACHERS' PAY AND TIME CALCULATIONS**

- 22.1. Teachers employed on an ongoing basis at the school but who work less than a full working week will be deemed to be part-time.
- 22.2. Part-time Teachers will be provided with a written statement detailing their working time obligations and the standard mechanism used to determine their pay, subject to the provisions of the statutory pay and working time arrangements and by comparison with the School's timetabled teaching week for a full-time Teacher in an equivalent post. This does not affect the TLR3 payment which is not pro rata for part time staff. See **Appendix 9** for further information.

## **23. TEACHERS EMPLOYED ON A SHORT-TERM NOTICE BASIS (SUPPLY)**

- 23.1. Teachers employed on a supply basis will be paid on a daily basis calculated on the assumption that a full working year consists of 195 days; periods of employment for less than a day being calculated pro rata.

2017/18 PAY RANGES

**Main Pay Range:**

<b>Point</b>	<b>Value</b>
MPR 1	£22,917
MPR 2	£24,486
MPR 3	£26,454
MPR 4	£28,490
MPR 5	£30,735
MPR 6	£33,824

**Upper Pay Range:**

<b>Point</b>	<b>Value</b>
UPR 1	£35,927
UPR 2	£37,258
UPR 3	£38,633

**Leading Practitioner Pay Range:**

<b>Point</b>	<b>Value</b>
LP 1	£39,374
LP 2	£40,360
LP 3	£41,368
LP 4	£42,398
LP 5	£43,454
LP 6	£44,544
LP 7	£45,743

LP 8	£46,799
LP 9	£47,967
LP 10	£49,199
LP 11	£50,476
LP 12	£51,639
LP 13	£52,930
LP 14	£54,250
LP 15	£55,600
LP 16	£57,077
LP 17	£58,389
LP 18	£59,857

**Unqualified Teachers Pay Range:**

<b>Point</b>	<b>Value</b>
UNQ 1	£16,626
UNQ 2	£18,560
UNQ 3	£20,492
UNQ 4	£22,427
UNQ 5	£24,362
UNQ 6	£26,295

**Leadership Pay Range:**

<b>Point</b>	<b>Value</b>
L 1	£39,374
L 2	£40,360
L 3	£41,368

L 4	£42,398
L 5	£43,454
L 6	£44,544
L 7	£45,743
L 8	£46,799
L 9	£47,967
L 10	£49,199
L 11	£50,476
L 12	£51,639
L 13	£52,930
L 14	£54,250
L 15	£55,600
L 16	£57,077
L 17	£58,389
L 18*	£59,264
L18	£59,857
L 19	£61,341
L 20	£62,863
L 21*	£63,779
L21	£64,417
L 22	£66,017
L 23	£67,652
L 24*	£68,643
L24	£69,330
L 25	£71,053
L 26	£72,810

L 27*	£73,876
L27	£74,615
L 28	£76,466
L 29	£78,359
L 30	£80,310
L 31*	£81,478
L31	£82,293
L 32	£84,339
L 33	£86,435
L 34	£88,571
L 35*	£89,874
L35	£90773
L 36	£93,020
L 37	£95,333
L 38	£97,692
L 39*	£99,081
L39	£100,072
L 40	£102,570
L 41	£105,132
L 42	£107,766
L 43	£109,366

\* These points and Point L43 are the maximum scale points for the eight Headteacher Group Ranges

ANNUAL TEACHERS' PAY REVIEW STATEMENT

<b>Name:</b> .....	<b>Employee No.:</b> .....
<b>School:</b> .....	<b>Effective Date:</b> .....

**SALARY DETAILS**

Salary and Point - Main Pay Range (S1 - S6)	£	Point
Salary and Point - Upper Pay Range (S1 – S3)	£	Point
Salary and Point - Unqualified Range (S1 - S6)	£	Point
Salary and Leading Practitioner Range	£	Point

**ALLOWANCES**

Details e.g. temp  
(with dates), reason  
for allowance

Teaching and Learning Responsibility Payments (See Pay Policy Advice) TLR1 / TLR2 / TLR3	TLR____ £
Recruitment or Retention (See Pay Policy Advice)	£
Special Educational Needs Allowance (See Pay Policy Advice)	£
Other Allowances - Please specify (See Pay Policy Advice)	£
<b>SAFEGUARDING</b>	£
<b>TOTAL SALARY</b>	£

Pay Committee Meeting on: .....

Signature of Headteacher / Chair of Committee: ..... Date: .....

**UPPER PAY RANGE PROGRESSION CRITERIA**

**1. Professional Attributes**

- 1.1. Contribute significantly, where appropriate, to implementing workplace policies and practice and to promoting collective responsibility for their implementation.

**2. Professional Knowledge and Understanding**

- 2.1. Have an extensive knowledge and understanding of how to use and adapt a range of teaching, learning and behaviour management strategies, including how to personalise learning to provide opportunities for all learners to achieve their potential.
- 2.2. Have an extensive knowledge and well-informed understanding of the assessment requirements and arrangements for the subjects/curriculum areas they teach, including those related to public examinations and qualifications.
- 2.3. Have up-to-date knowledge and understanding of the different types of qualifications and specifications and their suitability for meeting learners' needs.
- 2.4. Have a more developed knowledge and understanding of their subjects/curriculum areas and related pedagogy including how learning progresses within them.
- 2.5. Have sufficient depth of knowledge and experience to be able to give advice on the development and wellbeing of children and young people

**3. Professional Skills**

- 3.1. Be flexible, creative and adept at designing learning sequences within lessons and across lessons that are effective and consistently well-matched to learning objectives and the needs of learners and which integrate recent developments, including those relating to subject/curriculum knowledge.
- 3.2. Have teaching skills which lead to learners achieving well relative to their prior attainment, making progress as good as, or better than, similar learners nationally.
- 3.3. Promote collaboration and work effectively as a team member.
- 3.4. Contribute to the professional development of colleagues through coaching and mentoring, demonstrating effective practice, and providing advice and feedback.

ASSESSMENT OF TEACHER APPLICATION TO PROGRESS TO UPPER PAY RANGE

For Completion by the Teacher's Appraiser

Teacher's Name:	
Post:	

<b>Evidence from most recent appraisal</b> Please state which appraisal statement is attached:	
<b>*Criteria Met</b> (* Please delete as appropriate)	<b>*Criteria Not Met</b>
If criteria have not been met in full, please record details below (and continue overleaf, as necessary) about the areas of the Teacher's performance which do not satisfy the criteria:	

Signed \_\_\_\_\_ (Appraiser)

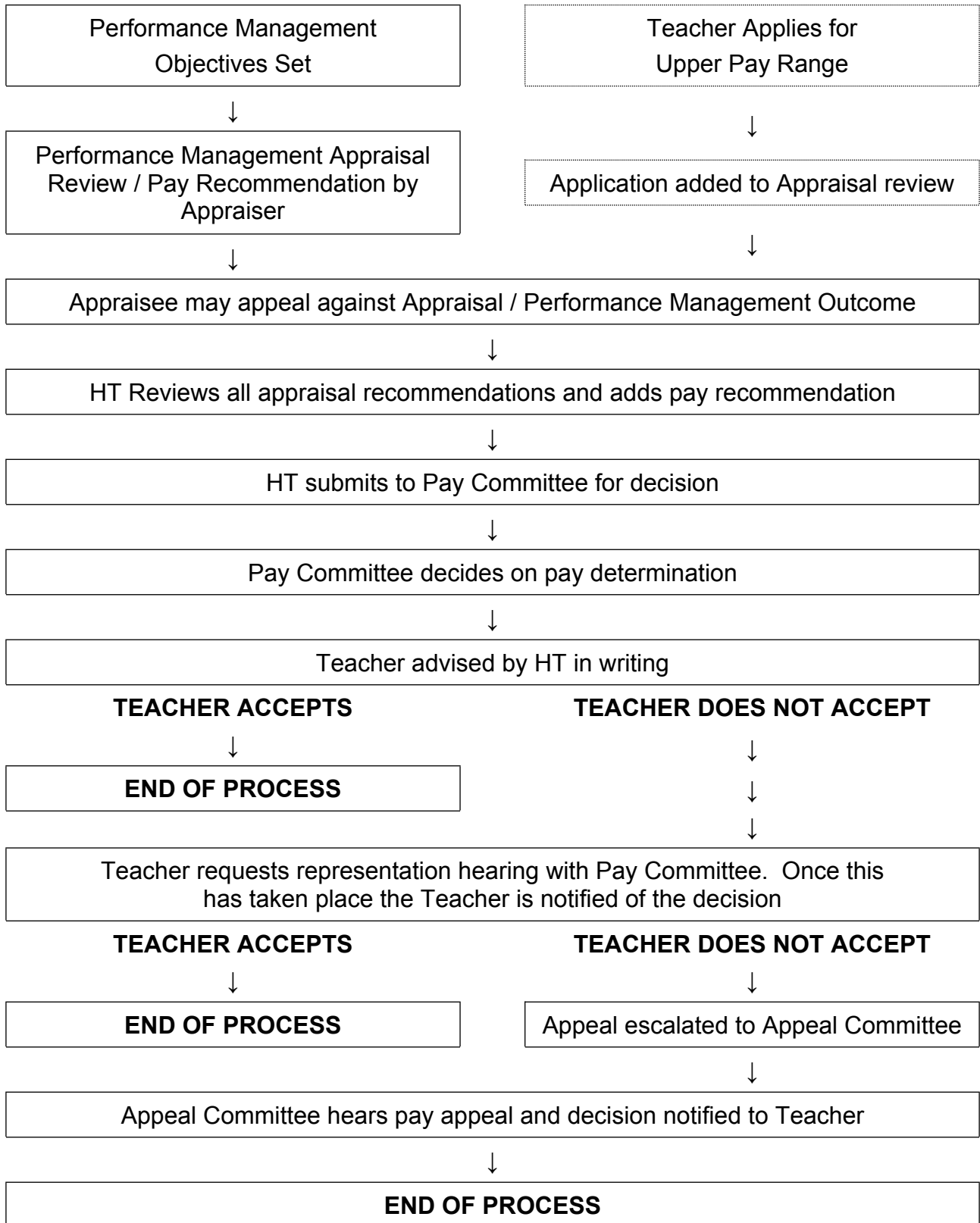
Date: \_\_\_\_\_

TO BE SUBMITTED TO THE HEADTEACHER

<b><u>School Use Only</u></b>
Application Form Received on: _____
Assessment made on: _____
By: _____



**FLOWCHART OF PAY REVIEW PROCESS  
(Not including Headteachers)**



**LEADERSHIP GROUP SALARIES GUIDANCE**

**1. Headteacher and Leadership Team (ALL SCHOOLS)**

Whilst there is no longer a national pay scale published for leadership posts within the STPCD, the national employers along with the recognised trade unions have published indicative pay rates based on a 43 step leadership salary scale on which a Headteacher, Deputy Headteacher and Assistant Headteacher could be paid as determined by the Governing Body. These are set out below.

**2. School Groups (ALL SCHOOLS)**

There are eight school groups determined from the unit score of the school. The STPCD specifies a maximum and minimum pay value for each group and the indicative pay rates published jointly by the employers and trade unions attach values to individual pay points within those ranges

The Governing Body has established a 7 point pay range for the Headteacher and a 5 point pay range for all other leadership posts.

**3. Unit Score of School**

**a. All Schools (excluding Special Schools)**

The unit score is calculated to determine the group of the School, using the formula in the STPCD. **In this Authority\*, the LA will recalculate the unit score annually and the results will be applied from 1<sup>st</sup> January each year.** If a school has reasonable grounds to expect a change in pupil numbers, they should request a recalculation by the Authority at that time.

**\* Delete if not appropriate**

**Information on how the unit score is calculated:**

This is determined by pupil numbers as shown on the most recent STATS 1 (annual school census) return to the Welsh Government.

<b>For each pupil at the foundation phase/ KS1/KS2</b>	<b>7 units</b>
<b>For each pupil in the school at KS3</b>	<b>9 units</b>
<b>For each pupil in the school at KS4</b>	<b>11 units</b>
<b>For each pupil in the school at KS5</b>	<b>13 units</b>

Each pupil with a **statement of special educational needs** shall, if she/he is in a special class consisting wholly or mainly of such pupils, count three units more than she/he would otherwise count. If she/he is not in such a special class count three such units only where the relevant body so determine.

Each pupil who attends for no more than half a day on each day for which she/he attends the school shall count half as many units as she/he would otherwise count.

Total Unit Score	School Group
Up to 1,000	1
1,001 - 2,200	2
2,201 - 3,500	3
3,501 - 5,000	4
5,001 - 7,500	5
7,501 - 11,000	6
11,001 - 17,000	7
17,001 and over	8

**b. Modified Unit Score (Special Schools Only)**

The modified unit score is calculated to determine the group of the school, using the formula in the STPCD. In this Authority\* the LA will recalculate the unit score annually and the results will be applied from 1<sup>st</sup> January each year. If a school has reasonable grounds to expect a change in pupil numbers, they should request a recalculation by the Authority at that time.

\* Delete if not appropriate

A special school must be assigned to a Headteacher group in accordance with the following table by reference to its modified total unit score calculated in accordance with sub-sections (i) and (ii) below:

Total Unit Score	School Group
Up to 2,200	2
2,201 - 3,500	3
3,501 - 5,000	4
5,001 - 7,500	5
7,501 - 11,000	6
11,001 - 17,000	7
17,001 and over	8

(i) **Information on how the staff-pupil ratio is calculated**

The proportion of staff to pupils at the school must be calculated and expressed as a percentage ('the staff-pupil ratio') in accordance with the following formula:

$$\frac{A}{B} \times 100$$

Where A is the number of Teachers and Support Staff weighted as provided at (a) below, and B is the number of pupils at the school weighted as provided at (b) below:

- a) The weighting for a Teacher is two units for each full-time equivalent Teacher, and the weighting for each Support Staff member is one unit for each full-time equivalent individual; and
- b) The weighting for a full-time pupil is one unit and the weighing for a part-time pupil is half a unit.

The staff-pupil ratio modifier must be calculated in accordance with the following table by reference to the staff-pupil ratio determined in accordance with the above:

Staff-Pupil Ratio	Staff-Pupil Ratio Modifier
1 - 20%	1
21 - 35%	2
36 - 50%	3
51 - 65%	4
66 - 80%	5
81% or more	6

**NB:** 'Support Staff member' means a member of the school staff who is not:

- A Teacher;
- A person employed in connection with the provision of meals;
- A person employed in connection with the security or maintenance of the school premises; or
- A person employed in a residential school to supervise and care for pupils out of school hours.

**(ii) Information on how the modified total unit score is calculated**

This is determined by pupil numbers as shown on the most recent STATS 1 (annual school census) return to Welsh Government.

The relevant body must determine the school's total unit score in accordance with the number of pupils on the school register calculated as follows:

<b>Key Stage</b>	<b>Units Per Pupil</b>
For each pupil in the Foundation Phase, KS1 and KS2	10
For each pupil in KS3	12
For each pupil in KS4	14
For each pupil in KS5	16

The relevant body must determine the school's modified total unit score by multiplying the school's total unit score determined under this section (i.e. as per the above table) by the staff-pupil ratio modifier calculated under section 3.

**NB:** Where the Headteacher is appointed as Headteacher of more than one school on a permanent basis, the relevant body of the Headteacher's original school or, under the Collaboration Regulations (5), the collaborating body must calculate the Headteacher group by combining the unit score of all the schools for which the Headteacher is responsible to arrive at a total unit score, which then determines the Headteacher group.

**4. New Leadership Appointments / Changes to existing Leadership Pay Structures - Three Stage Process (ALL SCHOOLS)**

The Governing Body should follow the three stage process when setting the pay for **new appointments or revising existing pay structures in respect of headship or the wider leadership team.**

**Stage 1** - Defining the role and determining the Headteacher group

**Stage 2** - Setting the indicative pay range

**Stage 3** - Deciding the starting salary and individual pay range

All decisions and the reasons for them should be well documented at every stage. All pay decisions must be made on objective criteria so that there is no discriminatory effect of any group of Teachers with a particular protected characteristic under the Equality Act 2010.

It is suggested that schools seek advice when calculating and recording leadership pay structure decisions

**Stage 1 - Defining the Role and Determining the Headteacher Group**

The Governing Body should, at this stage, define the job and identify the broad pay range as a provisional guide to determining appropriate level of pay. The Governing Body will need to define and set out the specific role, responsibilities and accountabilities of the post as well as the skills and relevant competences required.

For Headteacher posts, the Governing Body will assign the School to a Headteacher group (as defined in 3 above) which will determine the appropriate broad pay range as outlined below:

Group Size	Range of Steps	Salary Range (STPCD 2017)
1	L6 - L18	£44,544 - £59,264
2	L8 - L21	£46,799 - £63,779
3	L11 - L24	£50,476 - £68,643
4	L14 - L27	£55,250 - £73,876
5	L18 - L31	£59,264 - £81,478
6	L21 - L35	£63,779 - £89,874
7	L24 - L39	£68,643 - £99,081
8	L28 - L43	£76,263 - £108,283

For other leadership group posts, the Governing Body should consider how the role fits within the wider leadership structure of the School. The pay range for a Deputy Headteacher or Assistant Headteacher should only overlap the Headteacher's pay range **in exceptional circumstances**.

**Stage 2 - Setting the Indicative Pay Range**

At this stage, the Governing Body will need to consider the complexity and challenge of the role in the particular context of the School and make a judgement on pay in light of this.

For Headteacher posts, it is expected that normally the Governing Body will conclude that the total unit score fully captures the complexity of the Headteacher role and that the relevant broad pay range accommodates appropriate levels of reward, in line with the STPCD. The Governing Body will need to consider whether the indicative pay range should start at the minimum of the Headteacher group or whether they wish it to start at a higher level because of the level of challenge of the post.

There may be circumstances, however, in which there are additional factors that suggest the indicative pay range should be higher than would be provided by the basic calculation in Stage 1.

The following represent some examples of additional factors to be considered (this list is not exhaustive):

- The context and challenge arising from pupils' needs e.g. if there is a high level of deprivation in the community (Free School Meal entitlement and/or English as an Additional Language) or there are high numbers of looked after children or children with Additional Learning Needs and this affects the challenge in relation to improving outcomes;
- A high degree of complexity and challenge e.g. accountability for multiple schools or managing across several dispersed sites, which goes significantly beyond that expected of any Headteacher of similar-sized school(s) and is not already reflected in the total unit score used at stage 1;
- Additional accountability not reflected in stage 1, e.g. leading a teaching school alliance; and
- Factors that may impede the school's ability to attract appropriately qualified and experienced leadership candidates e.g. location, language medium, subject area / specialism and/or level of support from the wider leadership team.

The Governing Body may set the indicative pay range with a **maximum of up to 25% above the top of the relevant Headteacher group range.**

Above that limit, external independent advice must be sought and, should the advice suggest a range which exceeds this limit is appropriate, a business case must be made and agreed by the full Governing Body.

The Governing Body should ensure that no **double counting** takes place e.g. of things taken account of in stage 1, such as responsibility for an additional school already reflected in the total unit score; or from using overlapping indicators, such as FSM and the pupil premium.

The Governing Body **SHOULD NOT** increase base pay nor pay an additional allowance for regular local collaboration which is part of the role of all Headteachers.

For other leadership roles the process is broadly the same. The Governing Body will wish to consider how the other leadership roles should be set in accordance with the level set for the Headteacher and to ensure that there is sufficient scope for progression. Consideration should also be given to any teaching posts that carry additional allowances.

At the end of this stage, the Governing Body should decide where in the broad range to position the indicative pay range and set this out clearly when advertising the post. An overall judgement should be made on the position and breadth of range, allowing

appropriate scope for performance-related progression over time, clearly linked to school improvement priorities and outcomes.

There should be a clear audit trail for all decisions made and the reasoning behind them.

It is also expected where possible that the School will undertake a process of benchmarking of salaries before setting the pay range for the Headteacher or other leadership posts.

For those factors which are not expected to persist, such as temporary responsibility for an additional school, these should be reflected through an allowance rather than consolidated into the indicative pay range.

### **Stage 3 - Deciding the starting salary and Individual Pay Range for new appointments**

The first two stages provide the means for determining the appropriate pay range. The third stage is essentially about deciding on the starting salary for the individual who is to be offered the post.

At this stage, the Governing Body will have a preferred candidate for the role and will wish to set the starting salary in the light of candidate-specific factors, such as the extent to which the candidate meets the specific requirements of the post.

It will be important to ensure there is scope for performance-related progression over time.

There must be a clear audit trail for any advice given and a full and accurate record of all decisions made and the reasoning behind them.

## **5. Establishing a Pay Range above the School's Headteacher Group (ALL SCHOOLS)**

The expectation is that in most cases the pay range will be within the limits of the Headteacher group. However, in some cases e.g. where there may be significant difficulty in making an appointment or there is a need to incentivise a Headteacher to take on responsibility for a very large school or to lead multiple large schools, it may be appropriate to consider extending the individual pay range.

The Governing Body can, in such cases, decide that the maximum of the pay range may be above the maximum of the Headteacher group, **up to an additional 25%**.

If it is considered that there are exceptional circumstances that warrant an extension beyond that limit, a business case would be required. The Governing Body would need to seek external independent advice from an appropriate person or body who can consider whether it is justifiable to exceed the limit in a particular case.



There must be a clear audit trail for any advice given and a full and accurate record of all decisions made and the reasoning behind them.

## **6. Pay Progression for all Leadership Posts (ALL SCHOOLS)**

It is the responsibility of the Governing Body to ensure that performance-based progression awards reflect individual performance.

Schools should review and update their pay policies on an annual basis to ensure that they remain fit for purpose. Governing bodies will need to satisfy themselves that objective-setting is fair, reasonable and meaningful, but rigorous, and that the school's pay policy provides a clear link between levels of achievement and progression.

Governing bodies have the freedom to award progression increases as they judge appropriate in their particular circumstances. Although no progression award should be made if it is not justified.

The Governing Body will consider awarding additional increment(s) for sustained high quality performance against the set criteria, or where performance has been exceptional and exceeded all the expectations.

### Temporary Payments for Headteachers

In addition, the Governing Body may consider an additional payment to the Headteacher in respect of clearly temporary additional duties and responsibilities or duties that are in addition to the post for which their salary has been determined e.g. where they are providing services to other schools. Including where the Headteacher is appointed as a temporary Headteacher of one or more additional schools not included as a permanent factor in the calculation of the pay range.

## **7. Salary Protection (ALL SCHOOLS)**

If the School is assigned to a lower group, or the Governing Body chooses to reduce the leadership pay range, the member of staff will be entitled to receive a safeguarded sum for a period of up to three years, subject to the STPCD.

HEADTEACHER / DEPUTY HEADTEACHER / ASSISTANT HEADTEACHER  
ANNUAL REVIEW FORM  
(September 201\_\_)

<b>Name:</b> .....	<b>Employee No.:</b> .....
<b>School:</b> .....	

**\* Headteacher:**

School Group: ..... Headteacher Pay Range: £ ..... to £ .....

**\* Deputy / Assistant Headteacher:**

Pay Range: £ ..... to £ .....

Salary and Point at August 201\_\_: £ ..... Point: .....

Rationale used for Pay Decision:

.....  
.....

Revised Salary and Point at August 201\_\_: £ ..... Point: .....

Certified by Chair of Governors / Pay Committee: .....

Certified by Headteacher: ..... Date: .....

**\* Please delete as appropriate**

### PAY APPEALS PROCEDURE

The Governing Body is committed to ensuring that appeals against pay decisions are dealt with quickly, fairly and are consistent with equalities and other relevant legislation, as well as the STPCD.

Teachers, including Headteachers, may appeal any determination in relation to their pay or any other decision taken by the Governing Body (or a Committee or individual acting with delegated authority) that affects their pay.

Reasons for appeal may include the following, which is not an exhaustive list. That the person or Committee making the decision:

- a) incorrectly applied any provision of the STPCD;
- b) failed to have proper regard for statutory guidance;
- c) failed to take proper account of relevant evidence;
- d) took account of irrelevant or inaccurate evidence
- e) was biased; or
- f) or otherwise unlawfully discriminated against the Teacher.

For both the representation hearing and the appeal hearing, the Teacher is entitled to be accompanied by a work colleague or trade union representative.

#### Stage 1 - Informal Discussion

A Teacher who is dissatisfied with a pay recommendation has the opportunity to discuss the recommendation with his/her appraiser or the Headteacher before the recommendation is actioned and confirmation of the pay decision is made by the School.

If, having had an informal discussion with the person making the pay recommendation, the Teacher believes that an incorrect recommendation has been made, he/she may make representation to the Pay Committee of the Governing Body (see Stage 2 below).

#### Stage 2 - Representation Hearing

1. The Teacher receives written notification of the pay determination and, where applicable, details of the basis on which the decision was made. The Pay Committee will ensure the Teacher is aware of the process for making representation and appealing against the decision, if appropriate.
2. If the Teacher wishes to make representation, he/she should do so by writing to the Clerk to Governors within 10 school days of receiving the decision.
3. The Clerk to Governors will arrange for a representation hearing to take place as soon as possible, which will be chaired by the Pay Committee. The Headteacher may be required to attend the hearing to clarify the grounds for the pay recommendation.
4. The Teacher will be provided with between 5 and 10 school days' notice of the representation hearing. The Teacher may attend the hearing in order to present evidence, call witnesses and ask questions of the Pay Committee.

5. The Pay Committee will decide if the original pay determination is to be amended and will write to the Teacher about the outcome within 5 school days of the decision being reached.
6. Where the Teacher continues to be dissatisfied, he/she may appeal this decision within 10 school days of receiving the Committee's outcome letter by proceeding to Stage 3 of the process.

### **Stage 3 - Appeal Hearing**

1. The Teacher should clearly set out in writing the grounds for appealing the pay decision and send it to the Clerk to Governors within 10 school days of receipt of the written outcome of the Stage 2 decision (see above).
2. The Clerk to Governors will arrange for an appeal hearing to take place as soon as possible, but normally within 20 school days of the receipt of the written appeal notification.
3. The Teacher should be provided with between 5 and 10 school days' notice of the hearing.
4. The appeal should be heard by the Pay Appeals Committee comprising of a minimum of three eligible governors who were not involved in the original decision, or where the original Pay Committee comprised of more than three members, a number at least equal to that of the Pay Committee.
5. The Pay Appeals Committee's decision is final and, as set out in Section 3, paragraph 7 of the STPCD 2016, there is no recourse to the School's Grievance Procedure.
6. Those required to attend the appeal hearing include:
  - Chair and other Appeal Committee members
  - The Teacher and his/her representative or work colleague (if the Teacher is accompanied)
  - Witnesses for the employee side (if appropriate)
  - a member of the original Pay Committee who will clarify the reasons for the original decision
  - Witnesses for the management side (if appropriate)
  - Clerk to the hearing
  - HR Adviser to give advice to the Appeal Committee (subject to the provisions of any Service Level Agreement)

### **A model procedure for formal appeal meetings**

Chair introduces everyone and their role in the proceedings.

- The Teacher will present his/her case including any evidence to be considered and any witnesses they have called;

- Pay Appeals Committee members may ask questions of the Teacher, as may the Pay Committee representative;
- Pay Committee representative will state their case including the evidence on which the decision was based and call any witnesses to support the case, if appropriate
- Pay Appeals Committee members may ask questions of the Pay Committee representative, as may the Teacher;
- Both parties may make a closing statement if they wish (Teacher first, followed by Pay Committee representative). No new evidence can be introduced at this stage;
- Both parties leave the hearing;
- The Pay Appeals Committee may request advice from the HR Adviser (if applicable). Once this has been given, the HR Adviser will leave the hearing but may be recalled for further advice (if applicable);
- The Pay Appeals Committee will consider all the evidence and reach a final decision;
- The Pay Appeals Committee will call the parties back to inform the Teacher of the decision (if awaiting the decision) or instruct the Clerk to write to the Teacher on their behalf with their decision and the reasons for it; and
- The Clerk will notify the Local Authority of change of pay, if appropriate.

**PART-TIME TEACHERS' PAY AND TIME CALCULATIONS**

A School's Timetabled Teaching Week must be established and a part time Teacher must be paid a proportion of the STTW.

Each school must establish a STTW week for each Teacher, this refers to school sessions hours that are timetabled for teaching, including PPA but excluding break times, registration and assemblies.

Part-time Teachers will then be paid on actual teaching time excluding registration assemblies and breaks.

For Example:

If the school day, excluding registration and assembly, runs from 9.00am to 12.15pm and again from 1.15pm to 3.30pm with one 15 minute break in the morning session and one 15 minute break in the afternoon session, the STTW for a full-time Teacher would be calculated as 25 hours. If a part-time Teacher were employed for mornings only working 9.00am to 12.15pm every day, their percentage of the timetabled teaching week would be calculated as 15 hours. This is shown below:

	Morning Session (less breaks, registration & assembly)	+	Afternoon Session (less breaks, registration & assembly)	x	No. of Days in Timetable	=	STTW	% of STTW
Full-Time	3 Hours	+	2 Hours	x	5 Days	=	25 Hours	100%
Part-Time	3 Hours			x	5 Days	=	15 Hours	60%

**PPA and Management Time** must be included when calculating class contact time.

**Directed Time** - a Headteacher may allocate directed time to part-time Teachers (subject to conditions) as a proportion of a FTE 1265. Part-time Teachers can now be directed to cover breaks, assemblies and registration as part of their directed duties.

Part-time Teachers cannot be required to be available for work (either for teaching or other duties) on days they do not normally work. However, they may attend by mutual agreement with the Headteacher. Any resultant additional hours should be paid at the Teacher's normal salary.

Part-time Teachers may be required to carry out duties, other than teaching pupils, outside school sessions on the day on which the Teacher is normally required to be available for work (whether the Teacher is normally required to be available for work for the whole or part of that day). This can form part of directed time.

**SCHOOL STAFFING STRUCTURE**

(School to enter details below as applicable at the time of this Pay Policy being adopted by the Governing Body)

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## EXECUTIVE BOARD 18<sup>TH</sup> DECEMBER 2017

### MODEL UNATTACHED TEACHERS' PAY POLICY 2017/18

#### Recommendations / Key Decisions Required:

To endorse the Model Unattached Teachers' Pay Policy 2017/18

#### Reasons:

The Model Unattached Teachers' Pay Policy has been updated to reflect legislative changes introduced by the School Teachers Pay and Conditions Document 2017.

Relevant Scrutiny Committee to be consulted	NO
Executive Board Decision Required	YES
Council Decision Required	NO

#### EXECUTIVE BOARD MEMBER PORTFOLIO HOLDER:

Cllr. Mair Stephens; Cllr. Glynog Davies

Name of Head of Service:	Designations:	Tel Nos.: E-Mail Addresses:
Paul R. Thomas	Assistant Chief Executive (People Management)	01267 246123 <a href="mailto:PRThomas@sirgar.gov.uk">PRThomas@sirgar.gov.uk</a>
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# EXECUTIVE SUMMARY

## EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

### MODEL UNATTACHED TEACHERS' PAY POLICY 2017/18

#### 1. BRIEF SUMMARY OF PURPOSE OF REPORT

The Authority is required to adopt a pay policy that sets out the basis on which it determines teachers' pay and the date by which it will determine the teachers' annual pay review and also establish procedures for addressing teachers' grievances in relation to their pay. The document called School Teachers Pay and Conditions (STP&CD) is updated each year which can lead to amendments in the model pay policy offered to schools.

This revised Model Unattached Teachers' Pay Policy has been updated to reflect legislative changes introduced in the STPCD on 1<sup>st</sup> September 2017. The HR Group of the Education Regional Working (ERW) Consortium has updated the current Pay Policy to be offered to all schools across the region. The ERW Consortium consists of the following County Councils, Carmarthenshire, Ceredigion, Neath & Port Talbot, Pembrokeshire and Powys and City of Swansea.

Teaching associations have been fully consulted and has agreed the Model Unattached Teachers' Pay Policy 2017/18 both regionally and locally.

The ERW region developed a regional Model Unattached Teachers' Pay Policy. This policy encompasses the changes to teachers' pay arrangements as outlined in the STPCD 2017 and will assist in achieving a high level of consistency across the region.

Each Local Authority is going through their individual Council process for endorsement of the policy.

**DETAILED REPORT ATTACHED:            NO**

## IMPLICATIONS

Policy, Crime & Disorder & Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
<b>YES</b>	<b>YES</b>	<b>NONE</b>	<b>NONE</b>	<b>YES</b>	<b>YES</b>	<b>NONE</b>

### 1. Policy, Crime & Disorder

The document called School Teachers Pay and Conditions (STPCD) is updated each year which can lead to amendments in the model pay policy offered to schools.

### 2. Legal

The Model Unattached Teachers' Pay Policy has been updated to reflect legislative changes introduced by the School Teachers Pay and Conditions Document 2017.

### 5. Risk Management Issues

The Authority is statutorily bound to have a pay policy in place.

### 6. Staffing Implications

The HR Team will provide advice and guidance on the application of the Model Unattached Teachers' Pay Policy 2017/18 as required.

## CONSULTATIONS

I confirm that the appropriate consultations have taken place and the outcomes are as detailed below:

Signed:  \_\_\_\_\_  
**ASSISTANT CHIEF EXECUTIVE (PEOPLE MANAGEMENT)**

1. **Scrutiny Committee:** None
2. **Local Member(s):** None
3. **Community / Town Council:** None
4. **Relevant Partners:** None
5. **Staff Side Representatives and other Organisations**  
 ERW HR / TU Forum - 2<sup>nd</sup> October 2017;  
 HR / TU Policy Development Meeting - 26<sup>th</sup> October 2017

**Section 100D Local Government Act, 1972 - Access to information**  
**List of Background Papers used in the preparation of this report:**

THERE ARE NONE

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Ein Rhanbarth ar Waith  
Education through Regional Working

# Model Unattached Teachers' Pay Policy 2017/2018

Cynghrair o 6 awdurdod lleol yw ERW a reolir gan gyd-bwyllgor cyfansoddiadol cyfreithiol.  
Y nod yw gweithredu strategaeth a chynllun busnes rhanbarthol cytunedig a chefnogi gwelliant ysgolion.

ERW is an alliance of 6 local authorities governed by a legally constituted joint committee.  
Its aim is to implement the agreed regional strategy and business plan to support school improvement.



<b>DOCUMENT CONTROL</b>	
<b>Policy Name</b>	Unattached Teachers' Pay Policy 2017/18
<b>Department</b>	Human Resources
<b>Reviewing Officers</b>	ERW HR Group on behalf of the 6 constituent Local Authorities
<b>CONSULTATION PROCESS</b>	
<p>The following Trade Unions have been consulted in respect of this Policy:</p> <ul style="list-style-type: none"><li>• ASCL</li><li>• NAHT</li><li>• NASUWT</li><li>• NEU</li><li>• UCAC</li></ul>	

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**1. INTRODUCTION**

- 1.1. This Pay Policy provides a framework for making decisions on unattached Teachers' pay. It has been developed to comply with the requirements of the School Teachers Pay and Conditions Document (STPCD) and has been subject to consultation with all recognised Teaching Associations.
- 1.2. For the purpose of this policy, unattached Teachers refers to Teachers who do not fall under the control of School's Governing Bodies e.g. Peripatetic Teachers, Athrawon Bro, Centrally Employed Teachers etc.

**2. STATEMENT OF INTENT**

- 2.1. The procedures for determining pay in this service area will be consistent with the principles of public life: objectivity, openness and accountability.
- 2.2. Line Managers will act with integrity, confidentiality, objectivity and honesty in the best interest of the Local Authority in relation to the operation of this Policy.
- 2.3. Line Managers will be open about pay decisions made and actions taken, and will be prepared to explain decisions and actions to the interested persons.
- 2.4. Any future revisions to this policy will comply with the STPCD and will be subject to consultation with relevant parties, including recognised trade unions.

**3. EQUALITIES LEGISLATION**

- 3.1. The Local Authority is committed to ensuring equality in everything that we do. The Equality Act 2010 has replaced and strengthened previous equality legislation. The Local Authority will comply with all relevant equalities legislation.
- 3.2. This Policy will be applied consistently to all employees irrespective of age, disability, race, gender (sex), gender reassignment, marriage / civil partnership, pregnancy / maternity, religion, belief and sexual orientation.
- 3.3. The Local Authority will promote equality in all aspects of the service, particularly in relation to all decisions on the advertising of posts, appointing, promoting and paying staff, training and staff development.

**4. EQUALITIES AND PERFORMANCE-RELATED PAY**

- 4.1. The Local Authority will ensure that pay processes are transparent and fair. All decisions made will be objectively justified and recorded. Reasonable adjustments will be made on a case by case basis to take account of individuals' circumstances such as long-term absence on the grounds of maternity or ill-health



**5. JOB DESCRIPTIONS**

- 5.1. The Local Authority will ensure that each member of staff is provided with a job description in accordance with the agreed staffing structure (**see Appendix 10**).
- 5.2. Job descriptions will identify key areas of responsibility and may be reviewed and changed from time to time in consultation and in agreement with the individual(s) concerned in order to make reasonable changes in light of the changing needs of the Local Authority.

**6. APPRAISALS**

- 6.1. The Local Authority will comply with the School Teacher Appraisal (Wales) Regulations 2011, concerning the appraisal of unattached Teachers through the application of the Local Authority's Performance Management Policy.

**7. LOCAL AUTHORITY'S OBLIGATIONS**

- 7.1. The Local Authority will:
- Fulfil its obligations as set out in the STPCD and the Conditions of Service for School Teachers in England and Wales (the 'Burgundy Book');
  - establish a mechanism for dealing with pay decisions and pay appeals;
  - determine all pay progression decisions, taking account of recommendations from the Line Manager;
  - ensure that it makes funds available to support pay decisions, in accordance with this Pay Policy and the service area's spending plan;
  - ensure that Teachers, via their Line Manager, are informed about pay decisions which affect them, and that records are kept of recommendations and decisions made; and
  - monitor, on an annual basis, the outcomes of pay decisions, including the extent to which different groups of Teachers may progress at different rates. The outcome of the review will be shared with recognised trade union representatives.

**8. LINE MANAGER'S OBLIGATIONS**

- 8.1. The Line Manager will:
- ensure that all relevant factual information is considered during the appraisal process;

- ensure that all appraisers (where not the Line Manager) provide accurate, relevant, complete and timely information about pay recommendations;
- moderate performance assessments and initial pay recommendations to ensure consistency and fairness;
- submit pay recommendations to the appropriate Head of Service / Pay Panel and ensure the Head of Service / Pay Panel has relevant information upon which to make pay decisions;
- inform Teachers about the Local Authority's Pay Policy and ensure its accessibility;
- notify payroll and / or HR staff within the Local Authority about pay decisions to be implemented; and
- ensure that a report on the operation of the Pay Policy is made available for discussion at service area level with the relevant Trade Unions on an annual basis.

### **9. TEACHERS' OBLIGATIONS**

#### 9.1. Teachers will:

- familiarise themselves with the provisions of this Pay Policy, the STPCD, the relevant professional standards and all relevant Local Authority employment policies; and
- engage positively with the processes set out in this Policy

### **10. DIFFERENTIALS**

- 10.1. Within the framework of the STPCD, appropriate differentials will be created and maintained between posts within the service area, recognising accountability and job weight, and the Local Authority's need to recruit and retain sufficient Teachers of the required quality at all levels.

### **11. SAFEGUARDING**

- 11.1. Where a pay determination leads, or may lead, to the start of a period of safeguarding, the Local Authority will comply with the relevant provisions of the STPCD and will give the required notification as soon as possible and within no later than one month after the determination.

**12. CAPABILITY AND PAY PROGRESSION**

- 12.1. Where a Teacher's performance has been assessed as being unsatisfactory and the Teacher is subject to the Local Authority's Capability Procedure, the Local Authority's performance management processes will be suspended in relation to the Teacher concerned until the Capability Procedure has been concluded.
- 12.2. On conclusion of the Capability Procedure, the Teacher will resume performance management processes in accordance with the Local Authority's Policy.
- 12.3. Pay progression will not be permissible in accordance with this Pay Policy while a Teacher is subject to the Local Authority's Capability Procedure.
- 12.4. On conclusion of the Capability Procedure, the Teacher would re-enter the Performance Management cycle.
- 12.5. Pay progression will not be applied retrospectively in any case of capability.

**13. PAY DETERMINATION**

- 13.1. The appropriate Head of Service / Pay Panel for his / her service area(s) will make pay decisions. For all Teachers pay he / she will be advised by the appropriate Line Manager.

**13.2. Annual Determination of Pay**

- 13.2.1. All teaching staff salaries, including those of the Manager, deputy or assistant Manager (where employed in line with the STPCD), will be reviewed annually to take effect from 1<sup>st</sup> September. The Local Authority will conclude Teachers' annual pay reviews, and assessments of applications to progress to the Upper Pay Range, by 31<sup>st</sup> October; the Manager's annual pay review will be concluded by 31<sup>st</sup> December.
- 13.2.2. Reviews may take place at other times of the year to reflect, for example, any changes in circumstances, changes in a job description that lead to a change in the basis for calculating an individual's pay and in cases where a Teacher resumes performance management arrangements following capability processes.
- 13.2.3. The Local Authority will apply any future national pay awards as specified by the STPCD.

**13.3. Notification of Pay Determination**

- 13.3.1. A written statement will be given to each Teacher setting out the pay and any other financial benefits to which they are entitled following a determination. Where applicable, this will include information about the basis on which it was made. This will be done by 31<sup>st</sup> October for Teachers, 31<sup>st</sup> December for Managers, or by no later than one month following the determination.

**13.4. Appeals Procedure**

- 13.4.1. The Local Authority has an appeals procedure in relation to pay. This is set out in **Appendix 8** of this Pay Policy.

**14. MANAGER'S PAY (WHERE EMPLOYED IN LINE WITH STPCD)**

- 14.1. The Local Authority will ensure that the process of determining the remuneration of the Manager is fair and transparent.
- 14.2. The Local Authority will assign a seven-point leadership pay range, which can be reviewed as necessary, for the Manager, based on any permanent additional relevant factors as determined within the framework of the STPCD (specifically paragraphs 9.2, 9.3 and 9.4).
- 14.3. Additional factors to be taken into account will include all permanent responsibilities of the post, challenges specific to the role and all other relevant considerations, alongside any factors relating to recruitment and retention.
- 14.4. The Local Authority may re-determine the Manager's pay range if it becomes necessary to do so (including where the Manager becomes responsible and accountable for more than one setting on a permanent basis). The Manager's pay range may also be reviewed at any time if it considers it necessary to reflect a significant change in the responsibilities of the post.
- 14.5. Payments in respect of temporary responsibilities for the Manager will not be included in the pay range but will be determined in accordance with the STPCD as explained in **Appendix 6**.
- 14.6. The Local Authority will apply discretionary reference pay points for leadership pay as indicated in **Appendix 1** and has agreed a seven step pay range of L xxx to L xxx (*details to be inserted here by the service area*).

**14.7. Pay on Appointment**

- 14.7.1. For new appointments, the Local Authority will determine the leadership pay range to be advertised and will agree the starting pay on appointment, taking account of the full role of the Manager and the provisions of the STPCD.
- 14.7.2. The Local Authority will adopt a three-stage process when setting the pay for new Manager appointments as set out in **Appendix 6**.
- 14.7.3. The Local Authority will review the Manager's pay range, as necessary, to ensure fair pay relativities within the service area / Local Authority.
- 14.7.4. See **Appendix 6** of this Pay Policy for guidelines on leadership pay ranges and **Appendix 7** for the Annual Review Pay Statement.

**15. DEPUTY / ASSISTANT MANAGER PAY**

- 15.1. The Local Authority will use the discretionary reference pay points for leadership pay as indicated in **Appendix 1**.
- 15.2. The Local Authority will assign a five-point leadership pay range which can be reviewed as necessary for Deputy / Assistant Manager posts (where employed in line with the STPCD), based on any permanent additional relevant factors as determined within the framework of the STPCD.
- 15.3. The range for individual posts will be determined according to the duties and responsibilities of the post and may vary between posts.
- 15.4. In this Local Authority, the Deputy Manager five step pay range is L xx to L xxx (*pay details to be inserted here by the service area*).
- 15.5. In this Local Authority, the Assistant Manager five step pay range is L xx to L xxx (*pay details to be inserted here by the service area*).

**15.6. Pay on appointment**

- 15.6.1. When a new appointment needs to be made, the Local Authority will determine the leadership pay range for the post to be advertised and will agree the starting pay on appointment.
- 15.6.2. The pay range will be determined in accordance with the STPCD.
- 15.6.3. The Local Authority will adopt the three-stage process when setting the pay for new appointments to the wider leadership team as set out in **Appendix 6**.

**16. PAY PROGRESSION FOR THE LEADERSHIP TEAM**

- 16.1. The Local Authority must consider annually whether or not to increase the salary of members of the leadership team who have completed a year of employment since the previous pay determination and, if it determines to do so, to what salary within the relevant pay range determined in accordance with the STPCD and the School Teachers Appraisal (Wales) Regulations 2011.
- 16.2. Managers will be awarded pay progression following a successful appraisal review. The review will be deemed to be successful where the member of staff has evidenced a sustained high quality of performance and has met, or has made significant progress towards meeting, his / her performance management objectives.
- 16.3. Competence in relation to the relevant standards will be taken into account as part of the Local Authority's performance management process.
- 16.4. A sustained high quality of performance on the part of the member of staff should give him / her an expectation of progression to the top of the relevant pay range,

having always taken account of the recommendation made on the member of staff's performance management appraisal statement.

- 16.5. Where a member of staff's performance management objectives have not been met, or significant progress has not been made towards meeting the objectives, pay progression will not be awarded unless the Head of Service / Pay Panel is satisfied that there are relevant extenuating circumstances. Where such a discretionary award of pay progression is made, this decision will be recorded accordingly.
- 16.6. In making its decision regarding pay progression, the Head of Service / Pay Panel will take account of the appraiser's recommendation regarding pay progression, as outlined on the member of staff's performance management appraisal statement.
- 16.7. The Head of Service / Pay Panel will record its decision regarding pay progression on the Annual Pay Review form contained at **Appendix 7**. A copy of this form will be provided to the member of staff.
- 16.8. Where pay progression is granted, the member of staff's salary will increase with effect from 1<sup>st</sup> September of the current academic year.
- 16.9. Where pay progression is not granted, the rationale for that decision will be recorded on the Annual Pay Review form. The member of staff has the right to appeal against any decision not to grant pay progression. The appeals procedure is set out in **Appendix 8**.

## 17. CLASSROOM TEACHER PAY

### 17.1. Pay on Appointment

- 17.1.1. Advertisements for vacant posts in the Local Authority will be considered by the Line Manager **[and the (insert details of panel) where appropriate]**. All posts will be advertised either internally or externally, locally or nationally as appropriate.
- 17.1.2. The advertisement will include details of the pay range and any additional payments or allowances applicable to the post.
- 17.1.3. The Line Manager, and the Head of Service where appropriate, will determine the starting salary of a vacant classroom Teacher post, in accordance with the Main Pay Range and Upper Pay Range, detailed at **Appendix 1**.
- 17.1.4. The Local Authority is committed to the principle of pay portability for Teachers **who are currently paid in accordance with the provisions of the STPCD** and will apply this principle in practice when making new permanent and fixed-term appointments.
- 17.1.5. The Local Authority will not restrict the pay range advertised, or starting salary and pay progression prospects available for classroom Teacher posts, other than the minimum of the Main Pay Range and the maximum of the Upper Pay Range.

- 17.2. Pay Progression for Existing Main Pay Range and Upper Pay Range Teachers**
- 17.2.1. The Local Authority must consider annually whether or not to increase the salary of Teachers (excluding NQTs undertaking their induction year) who have completed a year of employment since the previous pay determination and, if it determines to do so, to what salary within the relevant pay range determined in accordance with the STPCD and the School Teachers Appraisal (Wales) Regulations 2011.
- 17.2.2. A sustained high quality of performance on the part of the Teacher should give him / her an expectation of progression to the top of the relevant pay range, having always taken account of the recommendation made on the Teacher's performance management appraisal statement.
- 17.2.3. Teachers will be awarded pay progression following a successful appraisal review. The review will be deemed to be successful where the Teacher has evidenced a sustained high quality of performance and has met, or has made significant progress towards meeting, his / her performance management objectives.
- 17.2.4. Where a Teacher's performance management objectives have not been met, or significant progress has not been made towards meeting the objectives, pay progression will not be awarded unless the Line Manager / Head of Service is satisfied that there are relevant extenuating circumstances. Where such a discretionary award of pay progression is made, this decision will be recorded accordingly.
- 17.2.5. Competence in relation to the relevant standards will be taken into account as part of the Local Authority performance management process.
- 17.2.6. In the case of Teachers who are already on the Upper Pay Range, the Line Manager / Head of Service will also take account of whether:
- The Teacher has maintained the criteria for assessment to the Upper Pay Range (see **section 18.8** – 'Assessment', and **Appendix 2**); and
  - The Teacher continues to be highly competent in all elements of the relevant standards.
- 17.2.7. In making its decision regarding pay progression, the Line Manager / Head of Service will take account of the appraiser's recommendation regarding pay progression, as outlined on the Teacher's performance management appraisal statement. The Line Manager / Head of Service will be advised by the appraiser in making all such decisions.
- 17.2.8. The Line Manager / Head of Service will record his / her decision regarding pay progression on the Annual Teachers' Pay Review Statement contained at **Appendix 2**. A copy of this form will be provided to the Teacher.
- 17.2.9. Where pay progression is granted, the Teacher's salary will be increased with effect from 1<sup>st</sup> September of the current academic year.

17.2.10. Where pay progression is not granted, the rationale for that decision will be recorded on the Annual Teachers' Pay Review Statement. The Teacher has the right to appeal against any decision not to grant pay progression. The appeals procedure is set out in **Appendix 8**.

## **18. APPLICATIONS TO BE PAID ON THE UPPER PAY RANGE**

18.1. A qualified Teacher may apply once each year to be paid on the Upper Pay Range in accordance with the STPCD and this Pay Policy.

18.2. It is each Teacher's responsibility to decide whether to submit an application.

18.3. In order for the assessment to be robust and transparent, it will be an evidence based process.

18.4. Personal objectives for the forthcoming appraisal cycle will be set, and agreed where possible, at a level which is sufficient to ensure that the criteria included in the STPCD for progression to the Upper Pay Range can be met, including that the Teacher is highly competent in all elements of the relevant standards.

18.5. Teachers who have been absent from work for sickness, disability or maternity-related reasons, along with those who are not subject to the Appraisal Regulations 2011 (i.e. a Teacher who is employed on a short-term contract of less than one term), may cite written evidence from a suitable and relevant period before the date of application in support of their application.

### **18.6. Process**

18.6.1. The closing date for an application to be submitted by a Teacher to his / her appraiser is **(LA to insert date here - normally prior to the end of the Summer Term)**.

18.6.2. Exceptions may be made in some specific circumstances, e.g. those Teachers who are on maternity leave or on sick leave as at the closing date for receipt of applications. In such circumstances, the Teacher may request - at least 2 weeks before the specified closing date - an extension of no more than half a term for the submission of an application.

18.6.3. The process for applications is:

- Teacher to inform appraiser in writing, within the required timescale (see paragraphs 16.7 and 16.8 above) that he / she wishes to be considered for progression to the Upper Pay Range and that his / her personal objectives for the forthcoming appraisal period should reflect this request.

Following completion of the relevant appraisal period:

- The appraiser will complete an assessment pro-forma as shown in **Appendix 4**, setting out the appraiser's recommendation in relation to progression to the Upper Pay Range, following completion of the relevant appraisal period;



- The Line Manager will consider the appraiser's recommendation and will make a recommendation to the Head of Service / Pay Panel;
- The Head of Service / Pay Panel will make a decision about pay progression, following receipt of advice from the Line Manager;
- The Teacher will receive written notification of the outcome of their application by 31<sup>st</sup> October in the relevant year;
- Where the application is unsuccessful, the written notification will set out details of the areas of the Teacher's performance which are not considered to have satisfied the relevant criteria set out in this Policy (see 'Assessment' below);
- If requested, oral feedback will be provided by the Line Manager. Oral feedback will normally be given within 10 working days of the date of notification of the outcome of the application. Feedback will be given in a positive manner and will include advice and support about areas for improvement in order for the Teacher to meet the relevant criteria; and
- Successful applicants will move to step 1 of the Upper Pay Range with effect from 1<sup>st</sup> September of the academic year following their application being supported.

18.6.4. Unsuccessful applicants may appeal the decision as outlined in **Appendix 8**.

### **18.7. Assessment**

18.7.1. An application will only be successful where the Head of Service / Pay Panel is satisfied that all of the requirements of the STPCD have been met, including that:

- the Teacher is highly competent in all elements of the relevant standards; and
- the Teacher's achievements and contribution to an educational setting or settings are substantial and sustained.

18.7.2. For the purposes of this Pay Policy, the Head of Service / Pay Panel will be satisfied that the Teacher has met the Local Authority's expectations for progression to the Upper Pay Range where the Upper Pay Range criteria (see **Appendix 3**) have been satisfied as evidenced by a successful appraisal review.

18.7.3. Further information, including details about sources of evidence, is contained in the Local Authority's Performance Management Policy.

## **19. LEADING PRACTITIONER ROLE**

19.1. The Local Authority may establish Leading Practitioner posts for Teachers whose primary purpose is the modelling and leading improvement of teaching skills.

## MODEL UNATTACHED TEACHERS' PAY POLICY 2017/18

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- 19.2. Where the Local Authority wishes to establish such posts it will determine the responsibilities and pay range for these posts. Consultation with relevant staff and trade unions will take place in relation to any such proposed changes to the staffing structure.
- 19.3. The Policy of the Local Authority will be to appoint any new Leading Practitioner Teacher to a 5-point range, as deemed appropriate by the Local Authority.
- 19.4. The pay range for Leading Practitioners will be in accordance with the STPCD, which is currently a minimum of £39,374 per annum (i.e. Leadership Pay Point 1) and a maximum of £59,857 per annum (i.e. Leadership Pay Point 18).
- 19.5. The Local Authority will use the discretionary reference pay points detailed at **Appendix 1**.
- 19.6. Pay progression for Leading Practitioners will be determined as per the process set out at 17.2.1 to 17.2.10 above

### 20. UNQUALIFIED TEACHERS

- 20.1. A Teacher on the unqualified pay range will be paid an annual salary between £16,626 and £26,295 per annum. The Local Authority will use the discretionary reference pay points detailed at **Appendix 1**.
- 20.2. Under the Education (Specified and Registration) (Wales) Regulations 2010 there are specific circumstances when those other than qualified Teachers who are registered with the Education Workforce Council may carry out 'specified work'.
- 20.3. The Local Authority will comply with these legal requirements and will only employ unqualified Teachers as specified in these Regulations.
- 20.4. The Local Authority may pay an additional allowance to an unqualified Teacher who meets the criteria as defined in the STPCD.
- 20.5. In order to progress up the pay range, unqualified Teachers will need to show that they have met or made significant progress towards meeting their performance management objectives, along with demonstrating the required improvement in their teaching skills.
- 20.6. In making its decision regarding pay progression, the Head of Service / Pay Panel will take account of the appraiser's recommendation regarding pay progression, as outlined on the Teacher's performance management appraisal statement. The Head of Service / Pay Panel will be advised by the Line Manager in making all such decisions.
- 20.7. The Head of Service / Pay Panel will record its decision regarding pay progression on the Annual Teachers' Pay Review Statement contained at **Appendix 2**. A copy of this form will be provided to the unqualified Teacher.

- 20.8. Where pay progression is granted, the unqualified Teacher's salary will be increased with effect from 1<sup>st</sup> September of the current academic year.
- 20.9. Where pay progression is not granted, the rationale for that decision will be recorded on the Annual Teachers' Pay Review Statement. The Teacher has the right to appeal against any decision not to grant pay progression. The appeals procedure is set out in **Appendix 8**.
- 20.10. An unqualified Teacher who obtains qualified Teacher status will be paid on the pay ranges for qualified Teachers, in accordance with this Pay Policy.

## **21. DISCRETIONARY ALLOWANCES AND PAYMENTS**

### **21.1. Teaching and Learning Responsibility Payments (TLRs)**

- 21.1.1. The Local Authority will award TLR1 and TLR2 payments to post holders as indicated in the staffing structure (see **Appendix 10**).
- 21.1.2. These payments will be awarded to Teachers who undertake clearly defined and sustained additional responsibility in the context of the service area's staffing structure for the purpose of ensuring the continued delivery of high quality teaching and learning and for which the Teacher is made accountable.
- 21.1.3. All job descriptions will be regularly reviewed and will make clear the responsibility or package of responsibilities for which a TLR is awarded.
- 21.1.4. The criteria for awarding a TLR1 and TLR2 payment will be in accordance with the STPCD.
- 21.1.5. The minimum and maximum range for a TLR1 is £7,699 to £13,027 per annum.
- 21.1.6. The minimum and maximum range for a TLR2 is £2,667 to £6,515 per annum.
- 21.1.7. The value of TLRs currently in use is as follows
- TLR1** - (details of each TLR1 to be inserted here by LA)  
**TLR2** - (details of each TLR2 to be inserted here by LA)
- 21.1.8. The Local Authority may award a fixed-term TLR3 payment to a Teacher of between £529 and £2,620 per annum for a clearly time-limited school improvement project, or one-off externally driven responsibilities.
- 21.1.9. The duration of the fixed-term, and the amount of annual payment will be established at the outset and will be paid on a monthly basis.
- 21.1.10. Where the Local Authority wishes to make TLR3 payments, the proposed responsibilities, level of payment and the duration of payment will be set out clearly following consultation with relevant staff and union representatives.
- 21.1.11. A Teacher in receipt of either a TLR1 or 2 may also hold a concurrent TLR3.

21.1.12. No safeguarding will apply in relation to an award of a TLR3.

21.1.13. A TLR1 or 2 payment awarded to a part-time Teacher will be on a pro rata basis but where a TLR3 payment is awarded to a part-time Teacher, the pro rata principle will **not** apply.

## **21.2. Special Educational Needs (SEN) Allowances**

21.2.1. The Local Authority will award SEN allowances in accordance with the criteria and provisions set out in the STPCD.

21.2.2. An SEN Allowance of no less than £2,106 per annum, and no more than £4,158 per annum, will be payable to a classroom Teacher in accordance with STPCD.

21.2.3. The SEN values are: (*details of each SEN Allowance / value to be inserted here by LA*)

21.2.4. In deciding the SEN value, the Local Authority will take into account the structure of the SEN provision, whether any mandatory qualifications are required for the post, the qualifications or expertise of the Teacher relevant to the post, and the relative demands of the post.

## **21.3. Acting Allowances**

21.3.1. Acting allowances are payable to Teachers who are assigned and carry out the duties of Manager, Deputy Manager or Assistant Manager in accordance with the STPCD.

21.3.2. The Local Authority will, within a four-week period of the commencement of acting duties, determine whether or not the acting post holder will be paid an allowance. In the event of a planned and prolonged absence, an acting allowance may be agreed in advance and paid from the first day of absence.

21.3.3. Any Teacher who carries out the duties of Manager, Deputy Manager, or Assistant Manager, for a period of four weeks or more, will be paid at an appropriate point of the Manager pay range, Deputy Manager pay range or Assistant Manager pay range, as determined by the Head of Service / Pay Panel. Payment will be backdated to the commencement of the duties but will normally be paid a month in arrears.

21.3.4. Acting allowances may also apply to Teachers covering absent colleagues in receipt of a TLR and / or SEN allowance.

## **21.4. Additional Payments**

21.4.1. With exception of those on the leadership range the Local Authority may make additional payments to a Teacher, in respect of:

- continuing professional development undertaken outside the working day;

- activities relating to the provision of initial Teacher training as part of the ordinary conduct of the service area;
- participation in out-of-school hours learning activity agreed between the Teacher and the Line Manager; and
- additional responsibilities and activities due to, or in respect of, the provisions of services by the Teacher relating to the raising of educational standards to one or more additional service areas / schools.

### **21.5. Recruitment or Retention Incentive Benefits**

- 21.5.1. The Local Authority can award lump sum payments, periodic payments, or provide other financial assistance, support or benefits for a recruitment or retention incentive. In deciding any such awards, the Local Authority will have regard to the STPCD and specialist HR advice.
- 21.5.2. Managers, Deputy Managers and Assistant Managers may not be awarded such a payment other than as reimbursement of reasonably incurred housing or relocation costs.
- 21.5.3. All other recruitment and retention considerations in relation to a Manager, Deputy Manager or Assistant Manager post will be taken into account when determining the pay range.
- 21.5.4. The reason for the award of any additional payment, the expected duration of any such incentive or benefit, and the review date after which they may be withdrawn will be made clear at the outset, in writing.
- 21.5.5. The Local Authority will conduct an annual review of all such awards.

## **22. PART-TIME TEACHERS' PAY AND TIME CALCULATIONS**

- 22.1. Teachers employed on an ongoing basis but who work less than a full working week will be deemed to be part-time.
- 22.2. Part-time Teachers will be provided with a written statement detailing their working time obligations and the standard mechanism used to determine their pay, subject to the provisions of the statutory pay and working time arrangements and by comparison with the service area's timetabled teaching week for a full-time Teacher in an equivalent post. This does not affect the TLR3 payment which is not pro rata for part-time staff. See **Appendix 9** for further information.

## **23. TEACHERS EMPLOYED ON A SHORT-TERM NOTICE BASIS (SUPPLY)**

- 23.1. Teachers employed on a supply basis will be paid on a daily basis calculated on the assumption that a full working year consists of 195 days; periods of employment for less than a day being calculated pro rata.

2017/18 PAY RANGES

**Main Pay Range:**

<b>Point</b>	<b>Value</b>
MPR 1	£22,917
MPR 2	£24,486
MPR 3	£26,454
MPR 4	£28,490
MPR 5	£30,735
MPR 6	£33,824

**Upper Pay Range:**

<b>Point</b>	<b>Value</b>
UPR 1	£35,927
UPR 2	£37,258
UPR 3	£38,633

**Leading Practitioner Pay Range:**

<b>Point</b>	<b>Value</b>
LP 1	£39,374
LP 2	£40,360
LP 3	£41,368
LP 4	£42,398
LP 5	£43,454
LP 6	£44,544
LP 7	£45,743

LP 8	£46,799
LP 9	£47,967
LP 10	£49,199
LP 11	£50,476
LP 12	£51,639
LP 13	£52,930
LP 14	£54,250
LP 15	£55,600
LP 16	£57,077
LP 17	£58,389
LP 18	£59,857

**Unqualified Teachers Pay Range:**

<b>Point</b>	<b>Value</b>
UNQ 1	£16,626
UNQ 2	£18,560
UNQ 3	£20,492
UNQ 4	£22,427
UNQ 5	£24,362
UNQ 6	£26,295

**Leadership Pay Range:**

<b>Point</b>	<b>Value</b>
L 1	£39,374
L 2	£40,360
L 3	£41,368

L 4	£42,398
L 5	£43,454
L 6	£44,544
L 7	£45,743
L 8	£46,799
L 9	£47,967
L 10	£49,199
L 11	£50,476
L 12	£51,639
L 13	£52,930
L 14	£54,250
L 15	£55,600
L 16	£57,077
L 17	£58,389
L 18*	£59,264
L18	£59,857
L 19	£61,341
L 20	£62,863
L 21*	£63,779
L21	£64,417
L 22	£66,017
L 23	£67,652
L 24*	£68,643
L24	£69,330
L 25	£71,053
L 26	£72,810



L 27*	£73,876
L27	£74,615
L 28	£76,466
L 29	£78,359
L 30	£80,310
L 31*	£81,478
L31	£82,293
L 32	£84,339
L 33	£86,435
L 34	£88,571
L 35*	£89,874
L35	£90773
L 36	£93,020
L 37	£95,333
L 38	£97,692
L 39*	£99,081
L39	£100,072
L 40	£102,570
L 41	£105,132
L 42	£107,766
L 43	£109,366

\* These points and Point L43 are the maximum scale points for the eight HeadTeacher Group Ranges

ANNUAL TEACHERS' PAY REVIEW STATEMENT

<b>Name:</b> .....	<b>Employee No.:</b> .....
<b>Service Area:</b> .....	<b>Effective Date:</b> .....

**SALARY DETAILS**

Salary and Point - Main Pay Range (S1 - S6)	£	Point
Salary and Point - Upper Pay Range (S1 – S3)	£	Point
Salary and Point - Unqualified Range (S1 - S6)	£	Point
Salary and Leading Practitioner Range	£	Point

**ALLOWANCES**

Details e.g. temp  
(with dates), reason  
for allowance

Teaching and Learning Responsibility Payments (See Pay Policy Advice) TLR1 / TLR2 / TLR3	TLR____ £
Recruitment or Retention (See Pay Policy Advice)	£
Special Educational Needs Allowance (See Pay Policy Advice)	£
Other Allowances - Please specify (See Pay Policy Advice)	£
<b>SAFEGUARDING</b>	£
<b>TOTAL SALARY</b>	£

Head of Service / Pay Panel Meeting on: .....

Signature of Line Manager: ..... Date: .....

**UPPER PAY RANGE PROGRESSION CRITERIA**

**1. Professional Attributes**

- 1.1. Contribute significantly, where appropriate, to implementing workplace policies and practice and to promoting collective responsibility for their implementation.

**2. Professional Knowledge and Understanding**

- 2.1. Have an extensive knowledge and understanding of how to use and adapt a range of teaching, learning and behaviour management strategies, including how to personalise learning to provide opportunities for all learners to achieve their potential.
- 2.2. Have an extensive knowledge and well-informed understanding of the assessment requirements and arrangements for the subjects / curriculum areas they teach, including those related to public examinations and qualifications.
- 2.3. Have up-to-date knowledge and understanding of the different types of qualifications and specifications and their suitability for meeting learners' needs.
- 2.4. Have a more developed knowledge and understanding of their subjects/curriculum areas and related pedagogy including how learning progresses within them.
- 2.5. Have sufficient depth of knowledge and experience to be able to give advice on the development and wellbeing of children and young people

**3. Professional Skills**

- 3.1. Be flexible, creative and adept at designing learning sequences within lessons and across lessons that are effective and consistently well-matched to learning objectives and the needs of learners and which integrate recent developments, including those relating to subject/curriculum knowledge.
- 3.2. Have teaching skills which lead to learners achieving well relative to their prior attainment, making progress as good as, or better than, similar learners nationally.
- 3.3. Promote collaboration and work effectively as a team member.
- 3.4. Contribute to the professional development of colleagues through coaching and mentoring, demonstrating effective practice, and providing advice and feedback.

ASSESSMENT OF TEACHER APPLICATION TO PROGRESS TO UPPER PAY RANGE

For Completion by the Teacher's Appraiser

Teacher's Name:	
Post:	

<b>Evidence from most recent appraisal</b> Please state which appraisal statement is attached:	
<b>*Criteria Met</b> (* Please delete as appropriate)	<b>*Criteria Not Met</b>
If criteria have not been met in full, please record details below (and continue overleaf, as necessary) about the areas of the Teacher's performance which do not satisfy the criteria:	

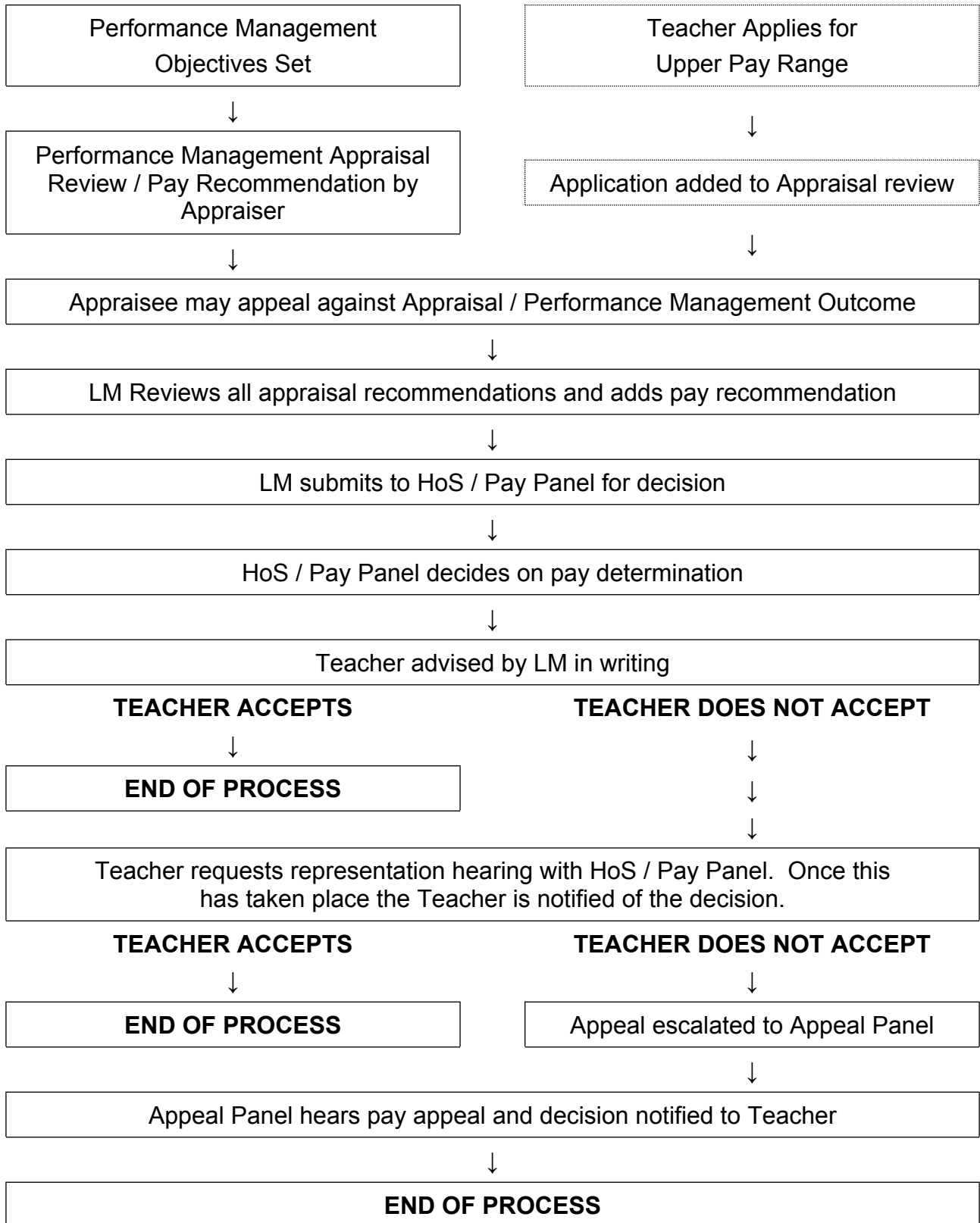
Signed ..... (Appraiser)

Date: .....

TO BE SUBMITTED TO THE LINE MANAGER / HEAD OF SERVICE

<b><u>Service Area Use Only</u></b>
Application Form Received on: .....
Assessment made on: .....
By: .....

**FLOWCHART OF PAY REVIEW PROCESS  
(Not including Manager)**



## LEADERSHIP TEAM SALARIES GUIDANCE

### 1. Manager and Leadership Team

Whilst there is no longer a national pay scale published for leadership posts within the STPCD, the national employers along with the recognised trade unions have published indicative pay rates based on a 43 step leadership salary scale on which a Manager, Deputy Manager and Assistant Manager could be paid as determined by the Local Authority. These are set out below.

### 2. New Leadership Appointments / Changes to existing Leadership Pay Structures - Three Stage Process

The Local Authority should follow the three stage process when setting the pay for **new appointments or revising existing pay structures in respect of Managers or the wider leadership team.**

**Stage 1** - Defining the role

**Stage 2** - Setting the indicative pay range

**Stage 3** - Deciding the starting salary and individual pay range

All decisions and the reasons for them should be well documented at every stage. All pay decisions must be made on objective criteria so that there is no discriminatory effect of any group of Teachers with a particular protected characteristic under the Equality Act 2010.

It is suggested that Head of Service seek advice when calculating and recording leadership pay structure decisions

#### **Stage 1 - Defining the Role**

The Local Authority should, at this stage, define the job and identify the broad pay range as a provisional guide to determining appropriate level of pay. The Local Authority will need to define and set out the specific role, responsibilities and accountabilities of the post as well as the skills and relevant competences required.

For other leadership team posts, the Local Authority should consider how the role fits within the wider leadership structure of the service area. The pay range for a Deputy Manager or Assistant Manager should only overlap the Manager's pay range in **exceptional** circumstances.

#### **Stage 2 - Setting the Indicative Pay Range**

At this stage, the Local Authority will need to consider the complexity and challenge of the role in the particular context of the service and make a judgement on pay in light of this.

For Manager posts, it is expected that normally the Local Authority will conclude that the total unit score fully captures the complexity of the Manager role and that the relevant broad pay range accommodates appropriate levels of reward, in line with the STPCD. The Local Authority will need to consider whether the indicative pay range should start at the minimum of the Manager's pay scale or whether they wish it to start at a higher level because of the level of challenge of the post.

There may be circumstances, however, in which there are additional factors that suggest the indicative pay range should be higher than would be provided by the basic calculation in Stage 1.

The following represent some examples of additional factors to be considered (this list is not exhaustive):

- The context and challenge arising from pupils' needs e.g. if there is a high level of deprivation in the community (Free School Meal entitlement and / or English as an Additional Language) or there are high numbers of looked after children or children with Additional Learning Needs and this affects the challenge in relation to improving outcomes;
- A high degree of complexity and challenge e.g. accountability for multiple service areas / schools or managing across several dispersed sites, which goes significantly beyond that expected of any Manager of similar-sized service area / school(s) and is not already reflected in the pay range; and
- Factors that may impede the service area's ability to attract appropriately qualified and experienced leadership candidates e.g. location, language medium, subject area / specialism and / or level of support from the wider leadership team.

The Local Authority may set the indicative pay range with a **maximum of up to 25% above the top of the relevant Manager pay range.**

Above that limit, external independent advice must be sought and, should the advice suggest a range which exceeds this limit is appropriate, a business case must be made and agreed by the Head of Service.

The Local Authority **SHOULD NOT** increase base pay nor pay an additional allowance for regular local collaboration which is part of the role of all Managers.

For other leadership roles the process is broadly the same. The Local Authority will wish to consider how the other leadership roles should be set in accordance with the level set for the Manager and to ensure that there is sufficient scope for progression. Consideration should also be given to any teaching posts that carry additional allowances.

At the end of this stage, the Local Authority should decide where in the broad range to position the indicative pay range and set this out clearly when advertising the post. An overall judgement should be made on the position and breadth of range, allowing appropriate scope for performance-related progression over time, clearly linked to service / school improvement priorities and outcomes.

There should be a clear audit trail for all decisions made and the reasoning behind them.

It is also expected where possible that the Local Authority will undertake a process of benchmarking of salaries before setting the pay range for the Manager or other leadership posts.

For those factors which are not expected to persist, such as temporary responsibility for an additional service area / school, these should be reflected through an allowance rather than consolidated into the indicative pay range.

### **Stage 3 - Deciding the starting salary and Individual Pay Range for new appointments**

The first two stages provide the means for determining the appropriate pay range. The third stage is essentially about deciding on the starting salary for the individual who is to be offered the post.

At this stage, the Local Authority will have a preferred candidate for the role and will wish to set the starting salary in the light of candidate-specific factors, such as the extent to which the candidate meets the specific requirements of the post.

It will be important to ensure there is scope for performance-related progression over time.

There must be a clear audit trail for any advice given and a full and accurate record of all decisions made and the reasoning behind them.

### **3. Establishing a Pay Range above the Manager's Pay Scale**

The expectation is that in most cases the pay range will be within the limits of the Manager's pay scale. However, in some cases e.g. where there may be significant difficulty in making an appointment or there is a need to incentivise a Manager to take on responsibility for a very large service area / school or to lead multiple large service areas / schools, it may be appropriate to consider extending the individual pay range.

The Local Authority can, in such cases, decide that the maximum of the pay range may be above the maximum of the Manager's pay scale, **up to an additional 25%**.

If it is considered that there are exceptional circumstances that warrant an extension beyond that limit, a business case would be required. The Head of Service would need to seek external independent advice from an appropriate person or body who can consider whether it is justifiable to exceed the limit in a particular case.

There must be a clear audit trail for any advice given and a full and accurate record of all decisions made and the reasoning behind them.



#### **4. Pay Progression for all Leadership Posts**

It is the responsibility of the Local Authority to ensure that performance-based progression awards reflect individual performance.

The Pay Policy should be updated on an annual basis to ensure that they remain fit for purpose. The Local Authority will need to satisfy itself that objective-setting is fair, reasonable and meaningful, but rigorous, and that the Pay Policy provides a clear link between levels of achievement and progression.

Local Authorities have the freedom to award progression increases as they judge appropriate in their particular circumstances. Although no progression award should be made if it is not justified.

The Local Authority will consider awarding additional increment(s) for sustained high quality performance against the set criteria, or where performance has been exceptional and exceeded all the expectations.

##### Temporary Payments for Managers

In addition, the Local Authority may consider an additional payment to the Manager in respect of clearly temporary additional duties and responsibilities or duties that are in addition to the post for which their salary has been determined e.g. where they are providing services to other service areas / schools. Including where the Manager is appointed as a temporary Manager of one or more additional service areas / schools not included as a permanent factor in the calculation of the pay range.

#### **5. Salary Protection**

If the Local Authority chooses to reduce the leadership pay range, the member of staff will be entitled to receive a safeguarded sum for a period of up to three years, subject to the STPCD.



### PAY APPEALS PROCEDURE

The Local Authority is committed to ensuring that appeals against pay decisions are dealt with quickly, fairly and are consistent with equalities and other relevant legislation, as well as the STPCD.

Teachers, including Managers, may appeal any determination in relation to their pay or any other decision taken by the Local Authority (or Pay Panel or individual acting with delegated authority) that affects their pay.

Reasons for appeal may include the following, which is not an exhaustive list. That the person or Panel making the decision:

- a) incorrectly applied any provision of the STPCD;
- b) failed to have proper regard for statutory guidance;
- c) failed to take proper account of relevant evidence;
- d) took account of irrelevant or inaccurate evidence
- e) was biased; or
- f) or otherwise unlawfully discriminated against the Teacher.

For both the representation hearing and the appeal hearing, the Teacher is entitled to be accompanied by a work colleague or trade union representative.

#### Stage 1 - Informal Discussion

A Teacher who is dissatisfied with a pay recommendation has the opportunity to discuss the recommendation with his / her appraiser or Line Manager before the recommendation is actioned and confirmation of the pay decision is made by the Local Authority.

If, having had an informal discussion with the person making the pay recommendation, the Teacher believes that an incorrect recommendation has been made, he / she may make representation to the Head of Service / Pay Panel (see Stage 2 below).

#### Stage 2 - Representation Hearing

1. The Teacher receives written notification of the pay determination and, where applicable, details of the basis on which the decision was made. The Head of Service / Pay Panel will ensure the Teacher is aware of the process for making representation and appealing against the decision, if appropriate.
2. If the Teacher wishes to make representation, he/she should do so by writing to the Head of Service / Pay Panel within 10 working days of receiving the decision.
3. The Head of Service / Pay Panel will arrange for a representation hearing to take place as soon as possible, which will be chaired by him / her. The Line Manager may be required to attend the hearing to clarify the grounds for the pay recommendation.
4. The Teacher will be provided with between 5 and 10 working days' notice of the representation hearing. The Teacher may attend the hearing in order to present evidence, call witnesses and ask questions of the Head of Service / Pay Panel.

5. The Head of Service / Pay Panel will decide if the original pay determination is to be amended and will write to the Teacher about the outcome within 5 working days of the decision being reached.
6. Where the Teacher continues to be dissatisfied, he / she may appeal this decision within 10 working days of receiving the Head of Service / Pay Panel's outcome letter by proceeding to Stage 3 of the process.

### **Stage 3 - Appeal Hearing**

1. The Teacher should clearly set out in writing the grounds for appealing the pay decision and send it to the Line Manager or other designated person (as agreed) within 10 working days of receipt of the written outcome of the Stage 2 decision (see above).
2. The Line Manager will arrange for an appeal hearing to take place as soon as possible, but normally within 20 working days of the receipt of the written appeal notification.
3. The Teacher should be provided with between 5 and 10 working days' notice of the hearing.
4. The appeal should be heard by a Panel. The Panel will comprise of a Head of Service and a Manager who were not involved in the original decision. In a Pupil Referral Unit, the appeal will be heard by members of the PRU Management Team not involved in the original decision.
5. The Appeal Panel's decision is final and, as set out in Section 3, paragraph 7 of the STPCD 2016, there is no recourse to the Local Authority's Grievance Procedure.
6. Those required to attend the appeal hearing include:
  - Chair and other Appeal Panel members
  - The Teacher and his/her representative or work colleague (if the Teacher is accompanied)
  - Witnesses for the employee side (if appropriate)
  - The Head of Service / Chair of Pay Panel who made the original decision, who will clarify the reasons for the original decision
  - Witnesses for the management side (if appropriate)
  - Clerk to the hearing
  - HR Adviser to give advice to the Appeal Panel (subject to the provisions of any Service Level Agreement)

### **A model procedure for formal appeal meetings**

Chair introduces everyone and their role in the proceedings.

- The Teacher will present his/her case including any evidence to be considered and any witnesses they have called;
- Appeals Panel members may ask questions of the Teacher, as may the Head of Service / Pay Panel representative;

**APPENDIX 8.**

- Head of Service / Pay Panel representative will state their case including the evidence on which the decision was based and call any witnesses to support the case, if appropriate
- Appeals panel members may ask questions of the Head of Service / Pay Panel representative, as may the Teacher;
- Both parties may make a closing statement if they wish (Teacher first, followed by Head of Service / Pay Panel representative). No new evidence can be introduced at this stage;
- Both parties leave the hearing;
- The Appeals Panel may request advice from the HR Adviser (if applicable). Once this has been given, the HR Adviser will leave the hearing but may be recalled for further advice (if applicable);
- The Appeals Panel will consider all the evidence and reach a final decision;
- The Appeals Panel will call the parties back to inform the Teacher of the decision (if awaiting the decision) or instruct the Clerk to write to the Teacher on their behalf with their decision and the reasons for it; and
- The Clerk will notify the Payroll Department of change of pay, if appropriate.

**PART-TIME TEACHERS' PAY AND TIME CALCULATIONS**

A School's Timetabled Teaching Week must be established and a part time Teacher must be paid a proportion of the STTW.

The Local Authority must establish a STTW week for each Teacher, this refers to school sessions hours that are timetabled for teaching, including PPA but excluding break times, registration and assemblies.

Part-time Teachers will then be paid on actual teaching time excluding registration assemblies and breaks.

For Example:

If the school day, excluding registration and assembly, runs from 9.00am to 12.15pm and again from 1.15pm to 3.30pm with one 15 minute break in the morning session and one 15 minute break in the afternoon session, the STTW for a full-time Teacher would be calculated as 25 hours. If a part-time Teacher were employed for mornings only working 9.00am to 12.15pm every day, their percentage of the timetabled teaching week would be calculated as 15 hours. This is shown below:

	Morning Session (less breaks, registration & assembly)	+	Afternoon Session (less breaks, registration & assembly)	x	No. of Days in Timetable	=	STTW	% of STTW
Full-Time	3 Hours	+	2 Hours	x	5 Days	=	25 Hours	100%
Part-Time	3 Hours			x	5 Days	=	15 Hours	60%

**PPA and Management Time** must be included when calculating class contact time.

**Directed Time** - a Line Manager may allocate directed time to part-time Teachers (subject to conditions) as a proportion of a FTE 1265. Part-time Teachers can now be directed to cover breaks, assemblies and registration as part of their directed duties.

Part-time Teachers cannot be required to be available for work (either for teaching or other duties) on days they do not normally work. However, they may attend by mutual agreement with the Line Manager. Any resultant additional hours should be paid at the Teacher's normal salary.

Part-time Teachers may be required to carry out duties, other than teaching pupils, outside school sessions on the day on which the Teacher is normally required to be available for work (whether the Teacher is normally required to be available for work for the whole or part of that day). This can form part of directed time.

**SERVICE AREA'S STAFFING STRUCTURE**

(LA to enter details below as applicable at the time of this Pay Policy being adopted by the Local Authority)

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## EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

<b>FIVE YEAR CAPITAL PROGRAMME 2018/19 – 2022/23</b>		
<b>RECOMMENDATIONS / KEY DECISIONS REQUIRED:</b>		
That Executive Board: <ul style="list-style-type: none"> <li>Notes the content of this report and endorses it for consultation purposes.</li> </ul>		
<b>REASONS:</b>		
To provide Executive Board with initial proposals for the Five Year Capital Programme for 2018/19 – 2022/23.		
Relevant scrutiny committees to be consulted: TBA		
Exec Board Decision Required		YES
Council Decision Required		NO
<b>EXECUTIVE BOARD MEMBER PORTFOLIO HOLDER:- Cllr David Jenkins</b>		
<b>Directorate:</b> Corporate Services  <b>Name of Director of Corporate Services:</b>  Chris Moore  <b>Report Author:</b>  Chris Moore	<b>Designation:</b> Director of Corporate Services	<b>Tel No.</b> 01267 224120  <b>E Mail Address:</b> Cmoore@carmarthenshire.gov.uk

# EXECUTIVE SUMMARY

## EXECUTIVE BOARD

18<sup>TH</sup> DECEMBER 2017

### FIVE YEAR CAPITAL PROGRAMME 2018/19 – 2022/23

The report provides members with an initial view of the 5 year Capital Programme from 2018/19 to 2022/23.

The report will form the basis of the budget consultation process with Scrutiny Committee and other relevant parties. Feedback from this consultation process along with the outcome of the final settlement will inform the final budget report which will be presented to members in February 2018.

DETAILED REPORT ATTACHED ?

YES

## IMPLICATIONS

I confirm that other than those implications which have been agreed with the appropriate Directors / Heads of Service and are referred to in detail below, there are no other implications associated with this report :

Signed: **C.Moore**

Director of Corporate Services

Policy, Crime & Disorder and Equalities	Legal	Finance	ICT	Risk Management Issues	Staffing Implications	Physical Assets
<b>NONE</b>	<b>NONE</b>	<b>YES</b>	<b>NONE</b>	<b>NONE</b>	<b>NONE</b>	<b>YES</b>

### Finance

The updated capital programme is projected to be fully funded over the 5 year period.

The programme includes potential grant funding sources that are yet to be confirmed and as the programme develops these proposals may need to be revisited if anticipated funding is not forthcoming.

### Physical Assets

New assets created from the Capital Programme will be added to the Council's portfolio. In addition the Programme proposes expenditure to improve the existing assets and comply with statutory responsibilities.

## CONSULTATIONS

I confirm that the appropriate consultations have taken in place and the outcomes are as detailed below

Signed: **C. Moore**

Director of Corporate Services

### 1. Scrutiny Committee

Relevant Scrutiny Committees will be consulted.

### 2. Local Member(s) N/A

### 3. Community / Town Council N/A

### 4. Relevant Partners

Consultation with relevant partners will be undertaken and results will be reported during the budget process.

### 5. Staff Side Representatives and other Organisations

Consultation with other organisations will be undertaken and results will be reported during the budget process.

### Section 100D Local Government Act, 1972 – Access to Information

#### List of Background Papers used in the preparation of this report:

Title of Document	File Ref No.	Locations that the papers are available for public inspection
2017-2022 Capital Programme		Corporate Services Dept, County Hall, Carmarthen

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# **REPORT OF DIRECTOR OF CORPORATE SERVICES**

## **EXECUTIVE BOARD**

**18th DECEMBER 2017**

### **FIVE YEAR CAPITAL PROGRAMME – 2018/19, 2019/20, 2020/21, 2021/22 and 2022/23**

<b>HEAD OF SERVICE &amp; DESIGNATION</b>	<b>DIRECTORATE</b>	<b>TELEPHONE NO.</b>
C Moore, Director of Corporate Services	Corporate Services	01267 224120
<b>AUTHOR &amp; DESIGNATION</b>	<b>DIRECTORATE</b>	<b>TELEPHONE NO.</b>
C Moore, Director of Corporate Services	Corporate Services	01267 224120

## **1. INTRODUCTION**

- 1.1. The report provides members with an initial view of the 5 year Capital Programme 2018/19, 2019/20, 2020/21, 2021/22 and 2022/23.
- 1.2. The report will form the basis of the budget consultation process with members and other relevant parties. Feedback from this consultation process, along with the outcome of the final settlement, will inform the final budget report which will be presented to members in February 2018.

## **2. BACKGROUND**

- 2.1. Members will recall that the authority last year agreed a 5 year capital programme 2017/18 to 2021/22 which was approved at County Council on 22 February 2017.
- 2.2. When the capital programme was approved it was fully funded by the end of the 4th year but showed a shortfall in the final year 2021/22. The programme was therefore approved on the basis that the budgets for this year be reviewed or reprofiled in order to address the funding shortfalls. This shortfall was subsequently addressed at the 2016-17 financial year end, where funds were allocated to balance the 5 year programme.
- 2.3. The capital programme has been revisited by the Strategic Assets Steering Group (SASG) and Departments were also asked to submit proposals to bring forward expenditure within the existing capital programme and to identify any new strategic projects.
- 2.4. Departments have also submitted proposals for new projects in 2022/23 which is the fifth year of the new programme. Projects have been

assessed and prioritised with only those regarded as a high priority being included in the programme.

- 2.5. The proposed capital programme is attached, in Appendix A, and shows the anticipated expenditure and sources of funding over the five year period.

### 3. PRIORITIES

- 3.1. The current Corporate Strategy for 2017-2022 sets out the Authority's strategic priorities, aspirations, overarching themes and core values, and the programme has been developed in line with these.
- 3.2. The proposed capital programme of £199m over the 5 years is aimed at delivering a number of key projects that will create jobs and improve the quality of life for the people of Carmarthenshire. The key investments are:

	£m
Schools	64
Housing (Non HRA)	10
Lesiure	27
Regeneration	32
Environment	57

### 4. FUNDING

- 4.1. The provisional settlement which has recently been received from the Welsh Government (WG) indicates capital funding of £9.4m for the Authority in 2018-19. This is made up of Supported Borrowing of £5.844m and General Capital Grant of £3.556m.
- 4.2. The level of capital receipts funding included within the programme has been revised in line with latest estimates. General capital receipts of £10.5m are forecasted over the 5 year period. In addition a further £1.33m of earmarked Education receipts is expected from the sale of redundant school buildings. It should be noted that there may be a need to amend future capital programmes if there is a shortfall in expected receipts.
- 4.3. Use of earmarked reserves was approved as part of previous year's reports and were included as funding for the current capital programme. In total some £35m of reserve funding is included over the five years of the programme.
- 4.4. Within the Modernising Education Programme (MEP) additional resources have been approved in recent years for the Band A 21<sup>st</sup> Century Schools projects. (This was in response to a request by the WG to bring forward their Band A projects for completion by 2018/19.) This investment includes supported borrowing, earmarked reserves and capital receipts and is part of the County Council's 50% contribution towards the Band A projects with the balance in funding coming from the WG.

WG have recently announced the approval of the Band B programme running from 2019 to 2026, with an estimated programme value of £129.5m for Carmarthenshire. This will require LA contribution in the region of £52m capital funding of which £19m is allocated in the programme to 2023. The £129.5m allocation includes £25m for the Mutual Investment Model (MIM) projects for which the LA are required to contribute 25% from revenue funding. The Mutual Investment Model is an alternative funding model developed by Welsh Government, which takes account of the whole life costs of the education building and is funding through a revenue contribution of upto 25% and WG grant funding of 75%. The Authority will need to monitor closely the development of this programme in order to ensure that funding is available to cover the projects as they are committed.

- 4.5. Funding from external parties in the form of grants for the whole of the capital programme is currently expected to be in the region of £56m.

## **5. CAPITAL PROGRAMME 2018/19 TO 2022/23**

- 5.1. When the capital programme was approved at County Council on 22 February 2017 it was fully funded by the end of the 4th year but showed a shortfall of £1m in 2021/22. As outlined in paragraph 2.2, this shortfall was addressed at the end of the 2016-17 financial year.
- 5.2. The review looked at both the existing projects and new proposals and the revised capital programme is set out for consideration.

### **Community Services**

- 5.3. Within Community Services the main additions include a further £1m for Pembrey Country Park developments and £500k for Carmarthen Museums Collections. Parc Howard museum is allocated £500k (2019/20).
- 5.4. Included within the Social Care section, is the budget of £6.8m for the Llanelli Area Review. This budget will be used in conjunction with the £0.2m allocated in 2016/17. Thereby the total budget for this scheme still stands at £7.0m.
- 5.5. In 2022/23 within Private Sector Housing, funding is provided for Disabled Facility Grants £2m, while in Leisure the Rights of Way Improvement Programme is allocated £50k.

### **Environment**

- 5.6. For 2022/23 further allocations to existing rolling programmes of work are included such as Highway Improvements £600k, Bridge Maintenance £400k and Road Safety Improvement £350k.
- 5.7. Funding is also allocated in 2022/23 to specific road projects such as the Cross Hands Economic Link Road Phase 2, with £750k of County Council funding being allocated.

- 5.8. A further phase of the redevelopment of the Glanamman Industrial Estate at £1m is included within the programme. The continuation and ongoing investment into Capitalised Maintenance of £2.9m is proposed for 2022/23.
- 5.9. A 5 year Fleet Replacement Programme for £9.722m is included to ensure that vehicles and plant machinery assets are replaced when they reach the end of their viable economic life. The funding for this capital spend will be provided directly from revenue budgets of the service users via prudential borrowing.

### **Education and Children**

- 5.10. In the Education and Children capital programme the MEP includes the continuation of the Band A 21<sup>st</sup> Century Schools improvement programme. The programme has been re-profiled to reflect updated costs and the phasing of work. Schemes are funded jointly by Welsh Government grant and the Authority.
- 5.11. Further funding has been allocated for the next stage of the 21<sup>st</sup> Century Schools improvement programme – Band B. £19m has been earmarked from County Council resources to match fund this investment.

Welsh Government have recently approved a programme of schemes totalling £129.5m for Carmarthenshire, which includes Capital Grant funding and the Mutual Investment Model.

### **Chief Executive**

- 5.12. IT services have £2.5m allocated across the programme. Priority of projects is to be reviewed by the service to ensure that the authority's needs are managed.

### **Regeneration**

- 5.13. Transformation Strategy Project Fund has been allocated £1.5m for 2022/23, along with allocations in 2019/20 for Rural Enterprise Fund of £1m and the Commercial Property Development Fund £1.5m to meet demand on existing grant schemes for 3<sup>rd</sup> party business's and commercial developments to create new employment opportunities and encourage economic growth.

## **6. WELLBEING OF FUTURE GENERATIONS (WALES) ACT 2015**

- 6.1. In considering the capital programme, members need to take into consideration the requirements of the Wellbeing of Future Generations (Wales) Act 2015. The Act requires the public bodies to carry out development sustainably, improving the economic, social, environmental and cultural well-being of Wales.



'... the public body must act in a manner which seeks to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs'

- 6.2. In doing so, we must demonstrate the following five ways of working:
- i. Looking at the long-term so that we do not compromise the ability of future generations to meet their own needs
  - ii. Understanding the root causes of issues to prevent them recurring
  - iii. Taking an integrated approach so that we look at all well-being goals and objectives of other services and partners
  - iv. Working with others in a collaborative way to find shared sustainable solutions
  - v. Involving a diversity of population in decisions that affect them
- 6.3. The Act identifies seven well-being goals and provide a shared vision for public bodies to work towards. We must work towards achieving all of them.
- i. A prosperous Wales
  - ii. A resilient Wales
  - iii. A healthier Wales
  - iv. A more equal Wales
  - v. A Wales of cohesive communities
  - vi. A Wales of vibrant culture and thriving Welsh Language
  - vii. A globally responsible Wales
- 6.4. Our well-being objectives are designed to maximise our contribution to achieving the seven well-being goals of the Act.
- 6.5. All projects within the programme have been assesses and scored with the five ways of working, the seven goals and our corporate well-being statement in mind.

## 7. SUMMARY

The table below gives a breakdown of the expenditure by departments and the sources of funding.

### Capital Programme Summary

	2018/19 £'000	2019/20 £'000	2020/21 £'000	2021/22 £'000	2022/23 £'000
<b><u>Expenditure</u></b>					
Community Services	10,159	15,185	13,100	3,708	2,100
Environment	14,894	12,099	8,596	14,395	7,215
Education & Children	12,492	24,584	15,205	9,190	2,230
Chief Executive	1,136	250	250	900	0
Regeneration	9,808	8,390	4,500	4,500	4,500
<b>Total Expenditure</b>	<b>48,489</b>	<b>60,508</b>	<b>41,651</b>	<b>32,693</b>	<b>16,045</b>
<b><u>Grants and Contributions</u></b>					
External Funding	15,733	15,419	14,305	7,055	3,165
<b>Net Expenditure Funded by CCC</b>	<b>32,756</b>	<b>45,089</b>	<b>27,346</b>	<b>25,638</b>	<b>12,880</b>
<b><u>CCC Funding</u></b>					
Supported Borrowing	5,844	5,844	5,844	5,844	5,844
Unsupported Borrowing	250	5,000	0	0	0
General Capital Grant	3,556	3,556	3,556	3,556	3,556
Additional Borrowing - Highways	325	0	500	0	0
Capital Receipts	4,745	5,931	5,007	1,500	1,500
Capital Reserves	10,224	16,122	6,473	2,181	0
Additional Borrowing – MEP	4,401	4,987	0	0	0
Prudential Borrowing - Fleet Replacement	447	549	366	6,380	1,980
MEP Reserve/DRF	2,364	0	5,000	4,000	0
Joint Venture Funding Llanelli Leisure Centre	0	2,500	0	0	0
Direct Revenue Funding	600	600	600	600	0
<b>Overall Net Position : Surplus (+) / Deficit (-)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>-1,577</b>	<b>0</b>

7.1. To summarise the overall position, the capital programme is funded for the first 3 years from 2018/19 to 2020/21 and year 5. There is currently a small shortfall of £1.577m in the 4<sup>th</sup> year of the programme 2021/22.

7.2. The total cost of the programme is £199m of which £143m is to be funded by the County Council and £56m is funded from external grants and contributions.

7.3. 7.3 The full detail of the proposed five year capital programme is attached in Appendix A.

## **8. REVENUE IMPLICATIONS**

- 8.1. No revenue implications have been validated within the revenue budget and if funding is required, departments will need to find resources from within their existing budgets.

## **9. RECOMMENDATIONS**

- 9.1. That Executive Board notes the content of this report and endorses it as a provisional capital programme for consultation purposes.

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**Appendix A**

**Five Year Capital Programme Proposals 2018/19, 2019/20, 2020/21, 2021/22 and 2022/23**

**Capital Programme**

COUNCIL FUND	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme
	2018/19	2018/19	2018/19	2019/20	2019/20	2019/20	2020/21	2020/21	2020/21	2021/22	2021/22	2021/22	2022/23	2022/23	2022/23
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
<b>COMMUNITIES</b>															
<b>Private Sector Housing</b>															
Disabled Facility Grants	2,000		2,000	2,000		2,000	2,000		2,000			2,000	2,000		2,000
<b>Social Care</b>															
Llanelli Area Review	100		100	5,000		5,000	1,500		1,500	158		158			0
<b>Leisure</b>															
<b>Sports &amp; Leisure</b>															
Llanelli Leisure Centre	1,000		1,000	4,000	1,000	5,000	7,000	2,500	9,500		1,000	1,000			0
AstroTurf Pitch (ATP) replacement at CLC										250		250			0
<b>Parks &amp; Countryside</b>															
Rights of Way Improvement Programme	50	50	100	50	50	100	50	50	100	50	250	300	50	50	100
Pembrey Country Park Masterplan	1,218		1,218	500		500									
Carmarthen Leisure Centre & Track	400		400												
Amman Valley Leisure Centre Masterplan	500		500	500		500									
Burry Port Harbour Dredging	602		602												
Burry Port Harbour Wall Works	875		875	985		985									
<b>Libraries &amp; Museums</b>															
Parc Howard Museum Masterplan				500		500									
Carmarthenshire County Museum Abergwili	1,012		1,012	150		150									
Carms Museums Collections	250		250	250		250									
Carmarthenshire Archive Relocation	2,102		2,102	200		200									
<b>Total Communities</b>	<b>10,109</b>	<b>50</b>	<b>10,159</b>	<b>14,135</b>	<b>1,050</b>	<b>15,185</b>	<b>10,550</b>	<b>2,550</b>	<b>13,100</b>	<b>2,458</b>	<b>1,250</b>	<b>3,708</b>	<b>2,050</b>	<b>50</b>	<b>2,100</b>
<b>ENVIRONMENT</b>															
<b>Street Scene</b>															
Highways Infrastructure															0
- Highways	600		600	600		600	600		600	600		600	600		600
- Bridges	854		854	400		400	400		400	400		400	400		400
Street Lighting Replacement & Upgrade	360		360												0
Pantyglyn Retaining Wall & Culvert	375		375												0
<b>Transportation</b>															
Multi Storey Car Park, Llanelli	60		60	60		60	60		60	60		60	60		60
Road Safety Improvement Schemes	250		250	275		275	350		350	375		375	350		350
Cross Hands Economic Link Road Phase 2		2,750	2,750	1,750	1,339	3,089	300	920	1,220	750	530	1,280	750		750
Tywi Valley Path	325	878	1,203	550	750	1,300	500	750	1,250	500	750	1,250			0
Ammanford Distributor Road Phase 2				100	50	150	150	25	175		150	150			0
Llanelli Rail Station															0
Walking & Cycling Linkages	25	275	300	100	300	400	100	325	425	100	375	475	100		100
Transport Interchange & Bus Corridor Improvements		25	25		5	5		100	100		100	100			0
Safe Routes in the Communities			0		225	225	0	225	225	0	225	225			0
Wind St/Tirydail Junction Ammanford	25	1,925	1,950		90	90									0
A4138 Hendy Link Road	25	425	450	100	275	375	25	250	275		150	150	50		50
Highway Junction Improvements/Signals Upgrade	25	110	135	25	135	160	25	110	135	25	25	50	25		25
Carmarthen West New Road - Developer Contribution	1,204	110	1,314												0
Field Replacement - Prudential Borrowing	447		447	549		549	366		366	6,380		6,380	1,980		1,980
<b>Property</b>															
Agriculture Working	861		861	521		521	115		115						0
Capital Maintenance	2,900		2,900	2,900		2,900	2,900		2,900	2,900		2,900	2,900		2,900
St Davids Park	35		35												
Glanamman Industrial Estate Redevelopment	25		25	1,000		1,000									
<b>Total Environment</b>	<b>8,396</b>	<b>6,498</b>	<b>14,894</b>	<b>8,930</b>	<b>3,169</b>	<b>12,099</b>	<b>5,891</b>	<b>2,705</b>	<b>8,596</b>	<b>12,090</b>	<b>2,305</b>	<b>14,395</b>	<b>7,215</b>	<b>0</b>	<b>7,215</b>

## Appendix A

### Five Year Capital Programme Proposals 2018/19, 2019/20, 2020/21, 2021/22 and 2022/23

#### Capital Programme

<div style="writing-mode: vertical-rl; transform: rotate(180deg); font-weight: bold;">                     P C O U N C I L F U N D                 </div>	Capital Programme														
	County Council Funding	External Funding 2018/19	Total Scheme	County Council Funding	External Funding 2019/20	Total Scheme	County Council Funding	External Funding 2020/21	Total Scheme	County Council Funding	External Funding 2021/22	Total Scheme	County Council Funding	External Funding 2022/23	Total Scheme
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
<b>EDUCATION &amp; CHILDREN</b>															
<b>Modernising Education Programme</b>															
Penrhos	818		818			0									
Trimsaran	90		90	144		144									
Parc Y Tywyn	1,575		1,575	170		170									
St John Lloyd Phase 1	252	17	269												
Llangadog	150	2,100	2,250	1,550		1,550	124		124						
Laugharne	100		100	500	500	1,000	300	500	800	63		63			
Gorlas	850	1,000	1,850	1,975	2,525	4,500	305		305						
Pontyberem	500	1,500	2,000	400		400									
Y Castell	95		95	100		100	100		100	1,850		1,850			
Pembrey	395	500	895	5,000	500	5,500	1,100		1,100	200		200			
Five Roads	642	1,068	1,710	1,325	1,675	3,000	136		136			0			
Llandeilo	20		20	20		20	20		20	2,500	250	2,750	1,115	115	1,230
Ammanford Primary	20		20	20		20	20		20	2,500	250	2,750	1,000		1,000
Dewi Sant	250		250	1,000	1,000	2,000	2,450	3,550	6,000	192		192			
Heol Goffa New School	500		500	2,000	2,000	4,000	3,000	2,000	5,000	480		480			
Rhys Prichard	50		50	1,750		1,750	1,550		1,550	855		855			
Llanybydder/Llanllwni			0	10		10	10		10	10		10			
Gwendreath Valley North			0	10		10	10		10	10		10			
Cross Hands Area			0	10		10	10		10	10		10			
Gwendreath Valley Central			0	10		10	10		10	10		10			
Llandybie CP			0	10		10	10		10	10		10			
<b>To be delivered via MIM</b>															
Ammanford Primary			0			0			0			0			
Gwenllian			0			0			0			0			
Hendy			0			0			0			0			
<b>Catering</b>															
Ysgol Griffith Jones Kitchen Refurbishment				130		130									
Emlyn Comprehensive Kitchen Refurbishment				150		150									
Brynsaron Kitchen Refurbishment				100		100									
<b>Total Education &amp; Children</b>	<b>6,307</b>	<b>6,185</b>	<b>12,492</b>	<b>16,384</b>	<b>8,200</b>	<b>24,584</b>	<b>9,155</b>	<b>6,050</b>	<b>15,205</b>	<b>8,690</b>	<b>500</b>	<b>9,190</b>	<b>2,115</b>	<b>115</b>	<b>2,230</b>
<b>CHIEF EXECUTIVE</b>															
<b>IT Strategy Developments</b>															
Enhancements to County Backbone Network	591		591												
Public Sector Network (PSN) Central Initiatives & Secure Comms	5		5												
Licence Management	50		50												
E Government / Service Transformation Developments	75		75												
IT Security Provision	61		61												
Cisco Replacement	4		4												
Systems Consolidation	50		50												
Mobile Developments	50		50												
Applications Interfacing	50		50												
Virtual Unix Replacement										110		110			
IT Strategy Developments				250		250	250		250						
Information Security and Governance										60		60			
Virtualised Server & Storage Environment Replacement										315		315			
Digital Transformation										75		75			
Disaster Recovery										190		190			
Legacy Network & Telephony Equipment Replacement										150		150			
Digital Transformation - Scheme development	200		200												
<b>Total Chief Executive</b>	<b>1,136</b>	<b>0</b>	<b>1,136</b>	<b>250</b>	<b>0</b>	<b>250</b>	<b>250</b>	<b>0</b>	<b>250</b>	<b>900</b>	<b>0</b>	<b>900</b>	<b>0</b>	<b>0</b>	<b>0</b>

## Appendix A

### Five Year Capital Programme Proposals 2018/19, 2019/20, 2020/21, 2021/22 and 2022/23

#### Capital Programme

COUNCIL FUND	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme	County Council Funding	External Funding	Total Scheme
	2018/19	2018/19	2018/19	2019/20	2019/20	2019/20	2020/21	2020/21	2020/21	2021/22	2021/22	2021/22	2022/23	2022/23	2022/23
	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
<b>REGENERATION</b>															
Transformation Strategy Project Fund	670	1,000	1,670	1,230	500	1,730	1,500	3,000	4,500	1,500	3,000	4,500	1,500	3,000	4,500
Rural Enterprise Fund	922		922	1,000		1,000									
Cross Hands East Phase 2	611		611			0									
Transformation Commercial Property Development Fund	2,377		2,377	1,500		1,500									
Pendine Iconic International Visitors Destination	830	2,000	2,830	1,660	2,500	4,160									
Ammanford Town Centre Regeneration	348		348												
Cross Hands East Enabling Fund	1,050		1,050												
<b>Total Regeneration</b>	<b>6,808</b>	<b>3,000</b>	<b>9,808</b>	<b>5,390</b>	<b>3,000</b>	<b>8,390</b>	<b>1,500</b>	<b>3,000</b>	<b>4,500</b>	<b>1,500</b>	<b>3,000</b>	<b>4,500</b>	<b>1,500</b>	<b>3,000</b>	<b>4,500</b>
<b>Total Council Fund</b>	<b>32,756</b>	<b>15,733</b>	<b>48,489</b>	<b>45,089</b>	<b>15,419</b>	<b>60,508</b>	<b>27,346</b>	<b>14,305</b>	<b>41,651</b>	<b>25,638</b>	<b>7,055</b>	<b>32,693</b>	<b>12,880</b>	<b>3,165</b>	<b>16,045</b>
<b>County Council Funding</b>															
Supported borrowing	4,098			5,292			344			5,844			5,844		
Supported borrowing-MEP	1,746			552			5,500								
Unsupported borrowing	250			5,000											
Additional Borrowing (Highways)	325						500								
General Capital Grant	3,556			3,556			3,556			3,556			3,556		
Capital Receipts	3,545			5,801			5,007			1,500			1,500		
Reserves	10,224			16,122			6,473			2,181					
Borrowing MEP	4,401			4,987											
Joint Venture Funding Llanelli Leisure Centre				2,500											
MEP Reserve Contribution	2,364						5,000			4,000					
Education Capital Receipts	1,200			130											
Direct Revenue Financing	600			600			600			600					
Prudential Borrowing - Fleet Replacement	447			549			366			6,380			1,980		
<b>Total County Council Funding</b>	<b>32,756</b>			<b>45,089</b>			<b>27,346</b>			<b>24,061</b>			<b>12,880</b>		
<b>Net Position (Minus = Shortfall)</b>	<b>0</b>			<b>0</b>			<b>0</b>			<b>-1,577</b>			<b>0</b>		

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# Agenda Item 17

By virtue of paragraph(s) 14 of Part 4 of Schedule 12A of the Local Government Act 1972 as amended by the Local Government (Access to Information) (Variation) (Wales) Order 2007.

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By virtue of paragraph(s) 14 of Part 4 of Schedule 12A of the Local Government Act 1972 as amended by the Local Government (Access to Information) (Variation) (Wales) Order 2007.

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# Agenda Item 18

By virtue of paragraph(s) 14 of Part 4 of Schedule 12A of the Local Government Act 1972 as amended by the Local Government (Access to Information) (Variation) (Wales) Order 2007.

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# Agenda Item 19

By virtue of paragraph(s) 14 of Part 4 of Schedule 12A of the Local Government Act 1972 as amended by the Local Government (Access to Information) (Variation) (Wales) Order 2007.

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