

MEETING: CABINET MEMBER - REGENERATION

DATE: Wednesday 16 December 2009

TIME: 11.00 am

VENUE: Town Hall, Bootle (this meeting will be video conferenced to the Town Hall, Southport)

Councillor

DECISION MAKER: Maher
 SUBSTITUTE: P Dowd

SPOKESPERSONS: Hough Ibbs

SUBSTITUTES: McGuire Pearson

COMMITTEE OFFICER: Olaf Hansen Committee Clerk
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 E-mail: olaf.hansen@legal.sefton.gov.uk

The Cabinet is responsible for making what are known as Key Decisions, which will be notified on the Forward Plan. Items marked with an * on the agenda involve Key Decisions

A key decision, as defined in the Council's Constitution, is: -

- any Executive decision that is not in the Annual Revenue Budget and Capital Programme approved by the Council and which requires a gross budget expenditure, saving or virement of more than £100,000 or more than 2% of a Departmental budget, whichever is the greater
- any Executive decision where the outcome will have a significant impact on a significant number of people living or working in two or more Wards

If you have any special needs that may require arrangements to facilitate your attendance at this meeting, please contact the Committee Officer named above, who will endeavour to assist.

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A G E N D A

Items marked with an * involve key decisions

<u>Item No.</u>	<u>Subject/Author(s)</u>	<u>Wards Affected</u>	
1.	Apologies for absence		
2.	Declarations of Interest Members and Officers are requested to give notice of any personal or prejudicial interest and the nature of that interest, relating to any item on the agenda in accordance with the relevant Code of Conduct.		
3.	Minutes of Previous Meeting Minutes of the meeting held on 23 November, 2009		(Pages 5 - 10)
4.	Draft Visitor Economy Strategy Report of the Head of Tourism	Ainsdale; Birkdale; Cambridge; Dukes; Kew; Meols; Norwood;	(Pages 11 - 80)
5.	Energy Carbon and Water Progress Report Head of Regeneration and Technical Services	All Wards	(Pages 81 - 108)
6.	Review of the HMRI Planning Framework Report of the Planning and Economic Regeneration Director	Derby; Linacre; Litherland; Netherton and Orrell;	(Pages 109 - 118)
7.	SUSTAIN- Interreg IVC programme Joint Report of the Planning and Economic Regeneration Director and Leisure Director	All Wards	(Pages 119 - 124)
8.	Local Economic Assessment Report of the Planning and Economic Regeneration Director	All Wards	(Pages 125 - 134)

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|-------|--|---|-------------------|
| 9. | Potential Funding Opportunity 1 Energy Efficiency and Renewable Energies in Social and Low Income Housing | Church; Derby;
Ford; Linacre;
Litherland;
Netherton and
Orrell; St. Oswald; | (Pages 135 - 148) |
| | Joint report of the Planning and Economic Regeneration Director and Strategic Director of Regeneration and Environmental Services and Deputy Chief Executive | | |
| * 10. | Potential Funding Opportunity 2 Low Carbon Communities Challenge 2010 2012 | Harington;
Ravenmeols; | (Pages 149 - 158) |
| | Joint report of the Planning and Economic Regeneration Director and Strategic Director of Regeneration and Environmental Services and Deputy Chief Executive | | |
| 11. | HMR Department, Service Delivery Plan '09-10, Half Year Performance Progress | Church; Derby;
Linacre;
Litherland;
Netherton and
Orrell; | (Pages 159 - 178) |
| | Report of the Housing Market Renewal Director | | |
| 12. | 50 - 64 Stanley Road, Bootle | Linacre | (Pages 179 - 184) |
| | Report of the Housing Market Renewal Director | | |

THE "CALL IN" PERIOD FOR THIS SET OF MINUTES ENDS AT 12 NOON ON TUESDAY 1 DECEMBER, 2009. MINUTE NOS.70, 71 AND 73 ARE NOT SUBJECT TO "CALL IN".

CABINET MEMBER - REGENERATION

MEETING HELD AT THE TOWN HALL, BOOTLE ON MONDAY 23 NOVEMBER 2009

PRESENT: Councillor Maher

ALSO PRESENT: Councillors Hough and Ibbs

65. APOLOGIES FOR ABSENCE

No apologies for absence were received.

66. DECLARATIONS OF INTEREST

No declarations of interest were received.

67. MINUTES OF PREVIOUS MEETING

RESOLVED:

That the Minutes of the meeting held on 28 October 2009, be confirmed as a correct record.

68. REVENUE AND CAPITAL EXPENDITURE MONITORING TO 30 SEPTEMBER 2009

The Cabinet Member considered the report of the Planning and Economic Regeneration Director on the quarterly forecast position, based on information as at 30 September 2009, in relation to the Regeneration Portfolio's 2009/10 Revenue Budget and Capital Programme. The report indicated the details of the Portfolio's budgets that were monitored and reported on the risk-assessed basis as set out in annexe A of the report. The portfolio's current capital programme was set out in Annexe B of the report.

The report concluded by seeking comments on the overall performance of the Portfolio's Revenue Budget and schemes within the Capital Programme and whether any comments thereon should be referred to the Cabinet for consideration.

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RESOLVED: That

- (1) the progress taken on the Regeneration portfolio's revenue budgets that were subject to risk-based monitoring be noted; and
- (2) the progress made on the schemes within the portfolio's element of the Council's Capital Programme be noted.

69. SEFTON BUSINESS VILLAGE PARTNERSHIP ACTIVITIES

The Cabinet Member considered the report of the Planning and Economic Regeneration Director that provided information on the activities undertaken by Sefton Business Village Partnerships.

RESOLVED: That

- (1) the Sefton Business Village Partnership Activities report be noted; and
- (2) it be noted that further reports on activities undertaken by Sefton Business Village Partnerships will be submitted as and when necessary.

70. THE DEVELOPMENT OF LOW CARBON ECONOMY IN RESPONSE TO CLIMATE CHANGE

Further to Minute No.64 of the meeting of Cabinet Member - Environmental held on 18 November, 2009 the Cabinet Member considered the joint report of the Strategic Director of Regeneration and Environmental Services and the Planning and Economic Regeneration Director advising of the likely impact of current and planned climate change legislation and regulations, the implications of developing a low carbon economy (LCE) in Sefton, and seeking approval of recommendations for the strategic management of change; and indicating that a decision on this matter was required as current and planned climate change legislation would impose requirements on local authorities, which required a proactive and co-ordinated approach to tackle climate change and which could only be achieved by changing current modes of operation across almost all economic sectors and moving to the development of an LCE.

The report indicated that there was mounting concern in government that targets for reducing CO₂ emissions were not being met; that the UK government was committed to reducing carbon emissions, establishing the Department of Energy and Climate Change (DECC) in October 2008 to co-ordinate such commitments, and passing the Climate Change Act in November 2008, which set out a framework for moving the UK to a low carbon economy and which established legally binding targets to reduce

carbon emissions by 80% on 1990 levels by 2050, and 34% by 2020; and detailed the impact of the legislation on Merseyside and for Sefton.

The report also detailed the actions required to move towards an LCE, which included in the short term, more research and intelligence; awareness raising and engagement; preparing for the CRC policy; energy efficiency programme; skills development and employment; supply chain development; business support; and community engagement; and for the medium/long term sustainable transport infrastructure; critical mass of demonstration projects; and integration and co-ordination.

Attached as an appendix to the report was background information on the UK policy on LCE.

RESOLVED: That

- (1) the report on the development of low carbon economy in response to climate change be noted; and
- (2) Cabinet be recommended to:
 - (A) recommend to the Sefton Borough Partnership that the co-ordinated response to the Climate Change and Low Carbon Economy agenda is made a highest level community strategy objective in the drafting of the required Sustainable Community Strategy and is practically delivered through the Economic Development and Sustainability Thematic Group of the Sefton Borough Partnership;
 - (B) insert the low carbon economy development objective in the next revision of the Council's Corporate Plan;
 - (C) nominate the Cabinet Member - Regeneration as the Low Carbon Economy Champion;
 - (D) reconfirm the Cabinet Member - Environmental as the Climate Change (Adaptation) Champion;
 - (E) nominate the Cabinet Member - Technical Services as the Corporate Community Energy Champion;
 - (F) recommend that the Economic Development and Sustainability Thematic Group of the Sefton Borough Partnership be a focus of co-ordinating wider community activity;
 - (G) recommend that progress on developing and delivering a comprehensive Climate Change Response Strategy and Action Plan be overseen by the Cabinet Member - Performance and Governance through the Council's performance management procedures; and

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(H) request further progress reports.

71. MERSEYSIDE LANDLORD ACCREDITATION SCHEME

The Cabinet Member considered the report of the Housing Market Renewal Director that sought endorsement of Sefton Council's active participation in the proposed Merseyside Landlord Accreditation Scheme.

RESOLVED: That

- (1) the Merseyside Landlord Accreditation Scheme Report be noted;
and
- (2) the Cabinet be requested to agree to Sefton's active participation in the Merseyside Landlord Accreditation Scheme at an annual cost of up to £12,521 per annum for 2009/10 – 2010/11 funded entirely from the Migration Impacts Fund and/or Housing Market Renewal Budget.

72. EXCLUSION OF PRESS AND PUBLIC

RESOLVED:

That, under Section 100A(4) of the Local Government Act, 1972, the press and public be excluded from the meeting for the following item of business on the grounds that it would involve the likely disclosure of exempt information as defined in paragraph 5 of Part 1 of Schedule 12A to the Act. The Public Interest Test has been applied and favours exclusion of the information from the press and public.

73. HOUSING MARKET RENEWAL PROGRAMME - HOUSING DEVELOPMENT OPPORTUNITY - KLONDYKE NEIGHBOURHOOD

The Cabinet Member considered the report of the Housing Market Renewal Director that sought approval to the making of a financial contribution towards public realm and site abnormal works as part of the development of the former Orrell Sports Ground site, Orrell Lane, by Bellway, the Council's appointed lead developer partner for the Klondyke Housing Market Renewal neighbourhood.

This was a key decision but was not on the Council's Forward Plan of Key Decisions. However, in accordance with the Council's Constitution, a Rule 15 had been completed and signed by the Chair of Overview and Scrutiny Committee (Performance and Corporate Services).

RESOLVED: That Cabinet be recommended to:-

- (1) approve the making of a financial contribution of £700,000 towards the overall development costs in respect of the development of the former Orrell Sports Ground site;
- (2) note the additional £500,000 secured by the Housing Market Renewal Programme from Newheartlands sources;
- (3) note that the Council will receive a proportion of the profit generated by the development that is equal to the proportion of development costs represented by the Council's financial contribution;
- (4) note that the Council will receive 20% of any additional profit generated from 'overage' as a result of the development;
- (5) instructs the Legal Director in consultation with the Finance and Information Services Director and Housing Market Renewal Director to enter into an appropriate legal agreement with Bellway Homes pursuant to securing the Council's position in respect of the partnership arrangement.

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REPORT TO: CABINET MEMBER REGENERATION AND ENVIRONMENTAL SERVICES
DATE: 16 December 2009
SUBJECT: Draft Visitor Economy Strategy
WARDS AFFECTED: Southport Wards
REPORT OF: Tony Corfield Head of Tourism
CONTACT OFFICER: Tony Corfield, Head of Tourism
Peter Sandman, Visitor Economy Manager
**EXEMPT/
CONFIDENTIAL:** No

PURPOSE/SUMMARY: To seek Member feedback on the draft Visitor Economy Strategy for Southport as part of a wider consultative process.
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REASON WHY DECISION REQUIRED: N/A
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RECOMMENDATION(S):

1) Members provide feedback on the attached draft Visitor Economy Strategy.

KEY DECISION: No

FORWARD PLAN: No

IMPLEMENTATION DATE: When Council and its partners agree the final version of the strategy. The draft version attached to the report is for consultation.

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ALTERNATIVE OPTIONS: It is unrealistic and inefficient to attempt to manage the delivery of a visitor economy supporting service without the benefit of an underpinning strategy and action plan for delivery. The options are limited to either developing this through a consultative process as recommended or imposing a strategy on partners, which is not considered a viable alternative.

IMPLICATIONS:

Budget/Policy Framework:

Within existing budgets and policies

Financial:

<u>CAPITAL EXPENDITURE</u>	2009/ 2010 £	2010/ 2011 £	2011/ 2012 £	2012/ 2013 £
Gross Increase in Capital Expenditure				
Funded by:				
Sefton Capital Resources				
Specific Capital Resources				
<u>REVENUE IMPLICATIONS</u>				
Gross Increase in Revenue Expenditure				
Funded by:				
Sefton funded Resources				
Funded from External Resources				
Does the External Funding have an expiry date? Y/N	When?			
How will the service be funded post expiry?				

Legal: N/A

Risk Assessment: N/A

Asset Management: N/A

CONSULTATION UNDERTAKEN/VIEWS;

Extensive work planning, creating and consulting on a sequence of earlier strategies and actions plans has naturally led to the development Southport as England's Classic Resort. This particular work sets out a draft proposal for the next 5 years of service delivery on behalf of the Council & its partners. It follows the Southport Investment Strategy and the recent Southport Brand Evaluation and Product Development study, both of which have been widely consulted before being adopted by the Council and a variety of public and private partners.

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CORPORATE OBJECTIVE MONITORING:

<u>Corporate Objective</u>		<u>Positive Impact</u>	<u>Neutral Impact</u>	<u>Negative Impact</u>
1	Creating a Learning Community	√		
2	Creating Safe Communities	√		
3	Jobs and Prosperity	√		
4	Improving Health and Well-Being	√		
5	Environmental Sustainability	√		
6	Creating Inclusive Communities	√		
7	Improving the Quality of Council Services and Strengthening local Democracy	√		
8	Children and Young People	√		

LIST OF BACKGROUND PAPERS RELIED UPON IN THE PREPARATION OF THIS REPORT

Southport Investment Strategy
Southport Brand Evaluation and Development

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BACKGROUND:

The Council has been leading the regeneration of Southport since 1997. The principle of establishing Southport as England's Classic Resort has been in place since 2003. It represents a Vision for the town's future as a sustainable visitor destination underpinned by a strong and successful visitor economy.

The Council resolved to adopt the Southport Investment Strategy as the third chapter of this regeneration process in 2008. One of the main cross cutting themes within the seven that make up the SIS is the Visitor Economy Theme.

As a precursor to developing the draft Visitor Economy Strategy to deliver on this theme, the Southport Brand Evaluation and Product Development study was developed and adopted earlier this year. That work fully informed the development of the draft Visitor Economy Strategy that is the subject of this report.

The draft VE strategy effectively proposes how the Council and its partners should deliver the next 5-year visitor economy element of progressing the town's vision of becoming England's Classic Resort. It is a key step on the journey to achieving that vision.

Once comments from appropriate stakeholders have been received, collated and where appropriate incorporated into the strategy, a final version will be brought back to committee for approval.

RECOMMENDATION(S):

- 1) Members provide feedback on the attached draft Visitor Economy Strategy

Southport Brand Partnership

Visitor Economy Strategy 2009 - 2014 DRAFT Version 3

October 2009

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1.0 INTRODUCTION

1.1 The Importance of the Visitor Economy to Southport

As the second destination brand within the Liverpool City Region, Southport has established itself as a core part of the Northwest's visitor economy providing a rich and diverse range of leisure, recreational and business tourism experiences for those who visit. The resort attracts over 11.5 million visitors to Merseyside per annum generating in the region of £250 million in day, short break and conference business. Southport's visitor economy also supports over 4000 full time equivalent jobs and creates demand for new and additional services that lead to the creation and growth of business. In short, the visitor economy is recognised as being critical to Southport's long term economic and social prosperity.

Over the last ten years, in excess of £200 million has been invested into the infrastructure of Southport's visitor economy to sustain the attractiveness of the resort in the face of increasing competition from domestic and overseas destinations. The resulting improvements to quality of product now lie at the heart of Southport's ambition to become England's Classic Resort and have exposed new market opportunities within the short break, golf and business tourism markets. In progressing these opportunities further, the visitor economy now acts as a key strategic driver within the Southport Investment Strategy and will be used to anchor regenerative activity over the next 10 – 15 years.

At a sub regional level, the tourism industry in the Liverpool City Region is estimated to be worth £1.3 billion in visitor spend with Southport and Liverpool accounting for approximately 60% of this share. Southport provides a diverse alternative to Liverpool's growing reputation as an international cultural destination and is well placed to capitalise on the increasing numbers of domestic and overseas visitors that are attracted to the city offer. In conference terms, the redevelopment of the Southport Theatre & Convention Centre coupled with increased 3 & 4star hotels has enabled new national market segments to be accessed through closer working with The Mersey Partnership. Similarly the increased awareness of the resort's golf product thanks to the Open at Royal Birkdale in 2008 has reaffirmed the importance of Southport to the region's golf offer and enhanced the national & international reputation of England's Golf Coast.

1.2 England's Classic Resort

The importance of the 'Classic Resort' vision to Southport cannot be understated. Since 2004 it has been responsible for generating significant investment in the town's visitor infrastructure as highlighted above, and has been effective in galvanising stakeholder support for the ongoing development of Southport's visitor economy.

In both product & perceptual terms, 'Classic Resort' means a return to Southport's heritage of being a stylish & sophisticated place that is seen to be 'a cut above' its competitors, capable of meeting the discerning expectations of today's visitors. The values underpinning 'England's Classic Resort' will therefore be evidenced in Southport's unique heritage & culture, in the pristine built and natural environment; the distinctiveness & quality of shopping; the restaurant and accommodation offer; and in the town's vibrant and sophisticated programme of cultural activity.

Clearly, there is still much work to be done in realising this vision. New experiences must be created so that they reflect the aspirations of today's visitors and stakeholders must recognise the levels of service and quality customers will associate with England's Classic Resort brand. This will mean greater attention being paid to improving the perceptions around the quality of Southport's retail offer (both in the short & long term), investing in public realm, improving town centre management and sorting out access & traffic issues that currently, are preventing the resort from capitalising on its unique character and sense of place.

In moving this agenda forward, a brand strategy for Southport recently completed by Locum Destination Consulting provides detailed guidance around how policy for developing and marketing Southport's product offer should be formulated. Whilst the recommendations of the brand strategy cut across a range of different policy areas, this strategy aims to build on Locum's recommendations by providing stakeholders with a 5 year action plan to prioritise activity and focus project delivery. In so doing, the strategy will endeavour to sustain the momentum that has been created to date in supporting Southport's transition into England's Classic Resort and will maximise the destination's wider contribution to the North West's economy as a whole.

1.3 Visitor Markets

Visitors to Southport can essentially be placed into three broad categories, those on business, those staying for a leisure break and day visitors. Whilst the business and golf markets in Southport are benefiting from improved facilities and quality accommodation, those staying in resort for leisure comprise older audiences (65+) occupying the lower socio economic grades (typically C2 D/E). These audiences will remain crucial to the balance of the resort's visitor economy in the short term, however the fragility and limited spending power of these markets means their size and value will reduce significantly over the next 10 years. Whilst this trend is obviously a cause for concern, repositioning Southport as England's Classic Resort will play a fundamental role in appealing to aspirations of the young, family and middle aged markets that possess the levels of disposable income capable of reversing this trend.

Day visitors to Southport are more mixed and account for circa 83% of all visits and generate approximately £350 million plus in expenditure per annum. Although there are still many traditional seaside visitors who are coming for an inexpensive day out, the breadth of Southport's existing product, particularly the retail and leisure attractions offer are attracting younger and more cosmopolitan audiences with particular appeal to those populations in and around Liverpool, Preston & Wigan.

The importance of the regional day visitor market in providing year round support for the vitality of businesses operating in Southport's visitor economy must not be overlooked. On average, day visitor spend in Southport is higher than other comparable destinations and to increase these levels further, Southport must continue to diversify its product offer to create year round demand from North West markets. Along with the resort's specialist retail offer, the new cultural centre and development of the seafront will help achieve this by adding critical mass to weight of the resort's leisure attractions which in turn will generate longer stays and higher per capita expenditures. Similarly, the diversity and credibility these investments will bring to the resort's product offer will also help strengthen links with Liverpool's cultural and heritage offer and the market opportunities this relationship will create.

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1.4 Purpose & Aims

This strategy seeks to provide a clear set of actions and priorities to everyone who will be responsible for delivering the Classic Resort Vision over the next 5 years and will be firmly based on implementing the detailed strategic guidance that has been received to date. Importantly, this will require all stakeholders to understand the breadth of the visitor economy so that a holistic and co ordinate approach to achieving the Classic Resort vision can be adopted. This will not only include Sefton Council's Tourism Team, but also planners, business support services, hoteliers, retailers, hospitality businesses, visitor attractions, cultural organisations and the many other stakeholders that have an interest in the future of the town.

The strategy will also seek to influence decision making and structure the work of stakeholders through priority setting and by developing robust mechanisms for monitoring performance. In so doing, it is anticipated that Southport and its stakeholders will be much better placed to capitalise on investment opportunities that in turn will enhance investor confidence and increase market share. The adoption of this strategy will also help Sefton achieve its wider social, environmental and economic goals.

To that end, the strategy has the following aims:-

1. Begin the process of developing the detail or 'fine grain' of the resort's retail, cultural and recreational product offer to enable Southport's positioning as England's Classic Resort to be implicit among key target audiences.
2. Reposition the resort's culture & leisure product to increase market share among day trip & staying visitor audiences by enhancing Southport's reputation as a "cosmopolitan" destination by 2012.
3. Develop new and existing events that will complement the brand values of a Classic Resort and support Southport's reputation for delivering activity that has a high cultural value by 2012.
4. Raise tourism infrastructure and service standards within the resort to fulfil customer expectations and exceed the benchmark Classic Resort standard.
5. Maximise the potential of Southport's new conference product offer and stock of quality accommodation to increase market share and establish the resort as a credible alternative to rival destinations such as Bournemouth and Harrogate.

2.0 WHERE ARE WE NOW?

2.1 The Tourism Market

Within the tourism industry there has seldom been greater choice for consumers than at present. The expansion of regional airports and budget airlines have made overseas travel easy and inexpensive, UK towns and cities are quickly developing burgeoning leisure, heritage and retail offers, and the information age has allowed access to tourism products 24/7 at the touch of a button. In short, the tourism industry today is unrecognisable compared to that of just 20 years ago.

Domestically, the UK tourism industry is worth some £86billion, employs 1.4 million people with direct tourism spending accounting for 2.7% of UK Gross Value Added. The impacts of the credit crunch, a weakened dollar and a variety of other factors including the expense of visiting the UK are expected to reduce revenues from certain key areas of inbound tourism considerably. Conversely, the relative strength of the Euro may make the UK a more attractive destination for visitors from Europe.

In the short term at least, the world-wide recession is expected to bring increased trips within the UK, particularly within the short breaks market. Visit Britain's Easter 2009 trip tracker with UK residents found an 8% drop in tendency to take an overseas break and a 6% rise in tendency to take a domestic break.

In relation to Business Tourism there has been a 53% growth in all business trips over the last ten years, with over 7 million visits being made to the UK per annum. Similarly international business visitors have contributed a massive £3.5 billion to the British economy. In total, business tourism (domestic and overseas) is estimated to generate revenue in the Northwest region of £1.7bn.

2.2 Market Trends

- Day Visits - Day visits are growing and form the majority of tourism trips within the UK amounting to £45.4 billion in spend. Whilst spend per capita are smaller than those of staying visitors, the sheer volume of UK day visitor market is making it an increasing important source of revenue for many UK tourism destinations. In the Northwest the figure has been calculated as being £6.3bn.
- Inbound Tourism - Inbound tourism into the UK accounted for 31.9 million overseas visitors during 2008 spending £16.4 billion. These figures represent a 2.6% decline in volume and 2.5% (nominal) increase in value compared with 2007 - this was the first decline in visitor numbers since 2001 and driven by unfavorable exchange rates, declining air traffic into the UK and the economic down turn. For the Northwest Inbound tourism accounted for 2.5m overseas visitors in 2008, spending £853m, although this likewise was a drop on 2007.
- Business Tourism – Business tourism, both corporate and MICE (meetings, incentives, conventions and exhibitions) sectors continue to increase and accounted for 18.2 overnight business trips spending £4.5 billion in 2008. It is notoriously difficult to predict how big the business tourism market is given that research samples are often too small to provide

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macro information and based primarily on measuring staying visitors numbers – it is important to note that two thirds of business events within the UK are non-residential.

- Long Stay Domestic Holidays - Long stay (4 nights +) leisure breaks are on the decline, however staying visits by UK residents still equate to 52 million holidays with expenditure reaching £11.4 billion in 2008 (Visit Britain). Given that domestic overnight trips are down 7% in the 12 months to February 2009 (although the current recession is see a trend toward increased domestic breaks – see above 'The Tourism Market'), there is an increasing need for destinations to think creatively about how they package experiences so they are better able to compete for business in the short breaks market. Similarly, UK tourism destinations need to think strategically about how they can create tourism products and services that will appeal to day visitor markets given the increasing need to protect their local visitor economy and maintain market share.
- Short Breaks - Leisure short breaks are weekend-oriented and securing mid-week occupancy is the greater concern for many accommodation providers catering mainly to the leisure market (for those serving the business market, the problem is the reverse).
- Heritage - Heritage plays an important role in UK tourism, generating an estimated 62.5m visits during 2008, which is estimated to be worth in the region of £3 billion to the Northwest alone. Heritage is seen to be a key influence on consumer decision making with research showing that 69% of adults visit at least one historic site each year with almost one in five making a trip every month.
- Event Tourism – Events tourism generates a quarter of the total value of the UK's visitor economy. Britain receives less than 5% of the global events market so the growth potential is huge. The lure of the 2012 Olympic and Paralympic Games has sparked heightened efforts from virtually every part of the UK to attract new events. Although this relates primarily to overseas tourism, events also generate a huge number of domestic tourism visits; some 39% of UK residents attend a special event at least 3-4 times a year. Sport and tourism events combined are estimated to contribute £1.5bn to the economy.

The prospects for growth in this area depend very much on the different genres offered. Recent years have seen significant growth in food festivals and in the run up to 2012 sporting events may increase in importance (it is estimated that the Loch Ness Marathon contributes £1m to the Highland area).

- Cultural Tourism – Cultural tourism has the ability to distinguish/individualize destinations that have strong heritage, community identity & are prepared to invest in the arts. Britain's tourist industry is mainly "cultural" and "heritage" based, with many tourists attracted to the country because of its rich and varied history. For day visitors, 23% indicated that "A bit of culture" was an important factor in a good day out. Meanwhile, for overseas visitors, 57% visited the built heritage (castles, churches, monuments, etc.) during their visit and 46% visited museums/art galleries.
- VFR - Visits to friends and relatives, especially by young people, are booming, accounting for some 44.1 million overnight stays/£4.8 billion expenditure in 2008 (Visit Britain).
- Outdoor Recreation - Tourism connected to outdoor activities, whether walking, cycling or other activities in the countryside are on the increase. 24% of all overseas visitors went

walking in the countryside on their visit and 66% of UK residents go for a day out in the countryside at least 3-4 times a year. It is possible that this area will grow, under the impetus for 'low environmental impact' activities and activities that improve wellbeing. Regardless of this, in the eyes of the domestic staying visitor, unspoilt countryside, beaches & coastlines are the two most important factors in choice of destination.

- Retail - Forecasts are being reset to reflect the impact of worldwide recession, however predictions still indicate that UK retail market is set to increase in size over the next 5 years (UK Retail Futures 2011: Sector Summary, Datamonitor predicted sector growth of 15% over the next five years equating to just over £312bn). Whilst the growing popularity of on line shopping and 'out of town' retail centres has the potential to jeopardise retail visits to town centres, established tourism destinations must endeavour to use their wider leisure/business/cultural offer to diversify the retail experience and secure competitive advantage.
- Arts & Creative Industries - Data from the Betamodel suggests that nationally the creative industries sector accounts for 1m jobs in 68,000 organisations, with 91,000 employees in the Northwest in 6,500 firms. Typically, this sector tends to be particularly reflective of SMEs and 88% of Northwest creative firms had 20 employees or less. This is an area showing signs of growth particularly in the Northwest and from 1999 to 2008 the number of enterprises in the region had grown by 82% and the number of employees by 87%. In terms of the value of this sector this is harder to quantify, but estimates from DCMS (including publishing) place this sector at 7.3% of the UK's total GVA.

Accommodation

- There has been a big switch from serviced accommodation to self-catering for long breaks.
- Serviced accommodation is the favoured option for short breaks, but self-catering is also on the increase.
- There has also been a recent growth towards upmarket and serviced apartment types of self-catering establishments, including modern furnishings and high-tech equipment, and these establishments attract both leisure and business guests.
- There is strong demand for self-contained holiday villages, including holiday villages based on static caravans (especially in seaside locations).
- Business Tourism however, has shown the largest movement towards star rated and branded hotels as opposed to the traditional conference hotels.

Demographics

- The population is getting older and post-family couples are a growing market - the over 55's are responsible for about 20% of all leisure tourism trips and 40% of spend.
- The population is getting steadily more middle-class and as a result ABC1's now represent and will continue to represent the mass market.
- There will be more single person households and households without children.

Consumer Behaviour & Expectations

- Consumers will continue not to take long holidays in the UK, however demand for quality destinations for short breaks and day trips will continue. It is anticipated that the trend of visiting friends and relatives among young people will also continue to grow.

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- Consumers will increasingly demand the guaranteed quality offered by branded products as well as the individuality of high quality independent products. There will be less tolerance for independent product that does not match the quality of equivalent branded products. Individuality will not be an acceptable excuse for poor quality.
- Consumers will expect product information to be of high quality and to be readily available online, through mobile devices and via blue tooth technology etc. They will also expect online and last minute bookings as standard; be able to produce & access user generated content and expect communication to come through a variety of sources including social networking sites.
- Research suggests that approximately 40% of business travellers will return with their families or colleagues as leisure visitors to destinations they have enjoyed visiting on business.
- Business visits are shorter than most other travellers, however they spend more than twice as much per day over a wide spectrum of tourism services, with conference delegates and visitors to trade shows and exhibitions spending even more.

Competition

- Consumers now have more choice than ever before. New and improved leisure offers abroad are aided by package holidays that are cheap and easily accessible. At home, many of our great towns and cities are developing their own tourism products (leisure and business) and providing significant investment to reinforce the attractiveness of the offer to fully exploit the growing day trip, short break and business tourism markets.

Other factors

- Whilst it is expected to be only a short term influence, the implications of 9/11, 7/7 and the continuing threat of terrorism in the Western World are still relevant and have implications for domestic tourism. Similarly the threat from a worldwide flu pandemic is just around the corner and has clear potential to destabilise the UK tourism economy.
- Climatic changes will also be a factor on the future demand within the tourism industry. Rising sea levels by 2050 (between 12cm – 67cm); rain fall during the summer months is now well above average; average temperatures will increase significantly by 2050.
- Macroeconomic factors that should also be considered are the strength of sterling again the Euro & the US Dollar and the potential implications for inbound tourism into the UK.
- Environmental issues must also be taken into consideration given the increasing importance consumers are paying to green issues in their decision making. Traffic congestion within the UK, waste minimisation, recycling, pedestrian friendly town centres and the increased access to other modes of transport will need to feature heavily in the make up of Southport's visitor economy. Sustainable tourism products and services are now expected as standard by consumers who are becoming increasingly aware of these issues in their decision making.

2.3 Implications for Southport & Key Markets

The temporary down turn in the world economy & the shrinking Eurozone economy, growing awareness among consumers about how their actions will affect the environment and the threat from a worldwide pandemic means that the tourism industry in general faces some challenging times ahead. Whilst there will be demand for tourism products and services at home and from abroad, Southport operates in a very competitive market where disposable incomes for

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consumers to spend on day visits & short breaks are reducing. Similarly as UK business reduce operating expenditures to counter the effects of the world wide recession, budgets for meetings & corporate events will be tightened and there is likely to be a reduction in demand and the size of MICE markets.

The challenge confronting Southport & its stakeholders over the next five years, relates to how prepared it is to work collectively, really understand its key visitor markets and be bold enough to recognise where product improvements need to be made so it remains a distinctive & attractive tourism proposition. To that end, stakeholders must recognise that consumers are becoming increasingly demanding, their experience must meet if not exceed expectations and they will be seeking out well packaged, unique and quality driven experiences. Similarly good customer service and well maintained destinations and facilities are a perquisite – they are a baseline, not a selling point.

Key Markets

Using the Arkenford Segmentation Model (industry recognised tourism market segmentation model - see appendix A) and the results of the 2007 North West Staying Visitor Survey, around 27% of staying visitors to Southport are either Habituals or Followers – the lowest value segments. By comparison Habituals & Followers make up 10% of Manchester's staying visitors and just 7% of Liverpool's. The higher value segments of Style Hounds and Cosmopolitans currently make up only 31% of staying visitors to Southport, compared to 47% and 43% in Manchester and Liverpool respectively. In terms of day visits, the Style Hound and Cosmopolitan segments spend significantly more than other segments (£45 & £38 respectively per trip) with Habituals spending around £15 per day.

Given that Southport will continue to attract day and short break visitors from within the North West, the table shown below demonstrates the size of each of these markets segments compared to other regions of the United Kingdom.

Ark Leisure Segmentation								
	Style Hounds	Cosmopolitans	High Street	Discoverers	Followers	Traditionals	Functionals	Habituals
North East	14%	20%	14%	12%	16%	9%	7%	8%
North West	14%	21%	16%	12%	10%	9%	9%	8%
Yorks & Humb.	10%	19%	17%	13%	12%	14%	7%	9%
East Midlands	11%	12%	19%	15%	15%	12%	9%	7%
West Midlands	11%	24%	20%	10%	8%	10%	9%	7%
Eastern	12%	17%	18%	8%	17%	12%	10%	5%
London	9%	22%	18%	9%	12%	13%	11%	6%
South East	8%	19%	21%	14%	12%	7%	9%	10%
South West	4%	15%	16%	16%	18%	10%	11%	10%
Wales	7%	18%	16%	16%	14%	12%	7%	9%
Scotland	11%	19%	20%	16%	10%	9%	8%	5%

The Southport Brand Strategy provides the framework from which the resort's existing and planned product offer must be developed and communicated if it is to meet the demands of the higher value Arkenford segments. In meeting these challenges however, recognition must be given to the fact that the experiences demanded by these audiences will be influenced by their age, their lifestyle and by the diversity of product making up the destination offer.

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Consequently, it is likely to be the creation of an aspirational evening economy that will be most effective in attracting young trendy high spending visitors (style hounds) to Southport. Similarly developing the strength, quality and diversity of Southport's retail, leisure (including golf) and cultural offering will be most effective in encouraging visits from the older Style Hound and Cosmopolitan audiences.

In terms of the business tourism market, Southport must now work with its sub regional partners to exploit the national associations market. The resort's renewed sense of purpose following the significant improvements to conference infrastructure makes it a genuine and credible option for the sector of the business tourism sector.

2.4 Sub Regional Working

The proposed restructure of TMP and the implementation of the new Liverpool City Region Tourism Strategy will be a key factor in taking the recommendations of this strategy forward. Within that context, Southport and to a degree the product offering of Sefton's Natural Coast are recognised as key products that will complement the city break experience and enhance the diversity of Merseyside's tourism offer as a whole. It is anticipated that within the 'restructured' TMP, Sefton will have more ability to influence policy and decision making around tourism policy within the sub region as well as becoming involved in the operational and tactical delivery of marketing, business tourism, events and tourism development activities. Consequently, the opportunity to raise the profile of the initiatives highlighted and our ability to secure external funding support should be enhanced.

2.5 The Strategy in Context

The visitor economy is as much about supporting local communities, providing opportunities for inward investment and regeneration as it is about enticing visitors to any one destination. With this in mind, the strategy recognises that tourism in Southport cannot be developed in isolation and it must reflect the needs of local residents, the private sector and the third sector in providing a coherent policy that will enhance Southport's sense of place/cultural identity, civic pride, social and economic well being. As a result, the strategy will evolve and integrate fully with policy and strategic thinking at all levels.

The following sections highlight some of the key strategic drivers that provide the context for this strategy.

Context	Principal Policy Documents
National	<ul style="list-style-type: none"> ❑ <i>DCMS (Central Government) - Tomorrow's Tourism 1999</i> ❑ <i>Visit England – English Tourism Strategy (awaiting publication June 2009).</i> ❑ <i>Visit Britain – British Tourism Framework Review 2009</i>
Regional/Merseyside	<ul style="list-style-type: none"> ❑ <i>Regional Economic Strategy 2006 (NWDA)</i> ❑ <i>A Strategy for Tourism in England's Northwest 2003-2010 (NWDA- Revised 2007)</i> ❑ <i>Action Plan for the City Region (TMP 2005)</i> ❑ <i>The Liverpool City Region – Winning Tourism for England's North West – A Vision and Strategy for Tourism to 2015 (TMP)</i> ❑ <i>Liverpool City Region Destination Management Plan 2008 - 2011 (TMP)</i> ❑ <i>Draft Liverpool City Region Tourism Strategy 2009 – L&R Consulting</i> ❑ <i>Sector Development & Partners for Tourism Growth ERDF</i>

	<i>Business Plan.</i>
Local	<ul style="list-style-type: none"> ❑ <i>A Vision for Sefton - The Community Strategy 2006 – 2011 (Sefton Borough Partnership)</i> ❑ <i>Sefton MBC – Corporate Plan 2008/2009 (Sefton Council)</i> ❑ <i>Draft Southport Brand Evaluation & Development Strategy 2009 (Locum Destination Consulting)</i> ❑ <i>Southport Business Tourism Business Plan 2009 (Blue Sail Consulting)</i> ❑ <i>Southport Investment Strategy (Southport Partnership)</i> ❑ <i>A Tourism Vision for Sefton 2020 - (SMBC: Tourism Dept.)</i> ❑ <i>Sefton Council – Sefton Coast Tourism Development Plan - (SMBC: Tourism Dept.)</i> ❑ <i>Sefton Council - Sefton Cultural Strategy 2007 – 2010 (SMBC: Leisure Dept.)</i>

*** all strategies listed above are available from Sefton Council, Tourism Department.**

Strategies that are considered to be of crucial importance to the development of Southport's tourism product are summarised below:-

NWDA - The Strategy for Tourism in England's Northwest 2007-2010

Updated in 2007, the Northwest Development Agency undertook a midterm review of the tourism strategy for England's Northwest first published in 2003. The focus of the strategy is to ensure that within ten years, England's Northwest offers visitors real excellence and super experiences, wherever they go, and has a thriving visitor economy that is second to none. The strategy provides a clear map for the development of tourism and is closely linked to delivering the key outcomes within the Regional Economic Strategy (RES). As a result the strategy is based on delivering 6 key strategic aims that range from enhanced communication with the region's visitors, demanding higher levels of productivity from those businesses operating in the visitor economy to improved products and higher quality experiences, investment in skills, improved infrastructure and sustainable development.

The regional strategy continues to place great emphasis on 'sub regional partnership working' through the regional tourist boards located in each of the main sub regions (Cheshire/Warrington, Merseyside, Greater Manchester, Blackpool/Lancashire and Cumbria). As the designated tourist board for Merseyside, the Mersey Partnership (TMP) will need to provide strategic direction for the sub region as a whole and ensure that product development and tourism marketing activity are aligned with regional tourism policy.

Draft Liverpool City Region Tourism Strategy 2009

This is a tourism strategy for the Liverpool City Region to 2020 and follows on from the previous 'Vision 2015' strategy, The Liverpool City Region: Winning Tourism for England's North West. It provides a framework to help achieve that vision. It will help all stakeholders with a responsibility or interest in tourism and the visitor economy to prioritise activity and as a result work together effectively to optimise the performance of tourism as a key economic sector for the City Region.

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The Mersey Partnership (TMP) – Destination Management Plan 2008/11

The Destination Management Plan (DMP) is set by the national strategic framework Tomorrow's Tourism and Tomorrow's Tourism Today (DCMS). It is also crucially informed by the Regional Tourism Economic Strategy, the Strategy for Tourism in England's Northwest (2007) and the sub-regional tourism strategy 'The Liverpool City Region – a Winning Brand for Tourism in England's North West'.

The DMP advocates a shared vision for Merseyside's tourism sector in 2015 that places the Liverpool City Region amongst the top 20 European City Region Destinations.

In achieving that vision, the DMP is split into five key strategic objectives:-

- To develop a class destination for conferences and business visits – so that the Liverpool City Region becomes a premier destination choice for association conferences of up to 1500 delegates.
- To promote the Liverpool City Region as a worldclass destination for leisure tourism – with a quality tourism offering and a top ten place in UK's most visited towns by international visitors.
- To develop the sub-region as a Major Events destination of international repute – with at least 3 major events per year that have an international visitor appeal.
- To deliver a warm Liverpool Welcome throughout the City Region – with consistently high customer satisfaction scores in destination benchmarking surveys.
- Destination leadership – to provide successful leadership, partner co-ordination and communication programme within the tourism sector.

Underpinning these objectives, the DMP identifies the following targets for the City Region to achieve by 2015:-

- One of the world's favourite cities - A Liverpool City Region that is amongst the top 20 European city region destinations for tourism. (29th in 2001)
- 25% growth in the number of 'bed nights' spent annually in the Liverpool City Region from 9.7 million in 2003 to 12 million.
- Annual visitor spending of £2 billion (up from £1 billion in 2003).
- 30,000 tourism supported jobs.
- Attain a top 100 place in the ICCA* rankings for international conference business (up from 262nd in 2005).

As the second destination brand within the City Region, the development of Southport's Cultural Centre, phase three improvements to Lord Street & Marine Park are among the Southport Investment Strategy initiatives contained with the DMP as investment priorities. Similarly Southport's emerging status as a regional conference centre, the importance of positing Southport as England's Classic Resort that complements the Liverpool City break experience and the ongoing development of Southport's major events programme are also referenced as being of critical importance to the future well being of the City Region's tourism sector.

Sefton Borough Partnership - A Vision for Sefton: The Community Strategy 2006 – 2011

The Community Strategy aims to achieve realistic improvements in the economic, social and environmental well being of Sefton over the next 10-15 years. The strategy sets out a plan

(comprising four strategic themes) to develop safer & stronger communities, improve services and facilities for all Sefton children and young people, reduce health inequalities between the borough's deprived areas & the rest of Sefton and to build partnerships capable of delivering sustainable economic development and enterprise.

Of particular relevance, the Community Strategy recognises that the visitor economy and Southport's transition into England's Classic Resort will be central to Sefton's future economic prosperity and in the creation of employment opportunities. The emphasis on improving workforce skills, improving opportunities for local residents to access job opportunities within the tourism industry, the promotion of sustainable consumption and the need to address environmental conservation issues are key policy drivers that will be used to support the 'fine grain' of the Classic Resort offer.

Draft Southport Brand Evaluation & Development Strategy 2009 (Locum Destination Consulting)

As the third chapter in a series of work Locum Destination Consulting have undertaken for Southport, the brand evaluation and product development strategy defines the 'fine grain' of the classic resort vision in product development and destination branding terms. Using the Arkenford segmentation model, it identifies a series of product clusters within the resort capable of reaching new consumer audiences as well as offering strategic guidance on branding and communications that will underpin future marketing activity.

The strategy reemphasises the need to utilise Southport's unique sense of place as being the key foundation from which to define the classic resort offer. Consequently, the development of Lord Street and to a lesser extent Kings Gardens/Marine Park will be key components in distinguishing Southport from its rivals. In conjunction with a revitalised seafront offer, the strategy advocates continued investment in these assets so they are able to anchor the leisure & business visitor experience. Importantly, the strategy places great emphasis on making Lord Street work harder for Southport in terms of enhancing the product offer and in attracting new, higher spending audiences. To that end it advocates the need for radical thinking around traffic calming, the evening economy, retail development, public realm works, cultural events and the organisational structures that will be required to oversee the development of Classic Resort brand.

Southport Investment Strategy

The Southport Investment Strategy essentially provides the next chapter of the Southport Seafront Action Plan. Developed in 2008 to guide the development of Southport into England's Classic Resort over the next 10 years, it focuses on taking a holistic approach to the development of the destination into a sustainable and cohesive community. Built around 7 key investment themes – Developing the Visitor economy, Town Centre Management, The Natural & Built Environment, Employment & Business, Housing, Transport and Sustainable & Cohesive Communities, the strategy will seek to guide the activity of stakeholders and provide the strategic rationale from which future investment will be gained.

The Visitor Economy theme will play a key role in driving the work of the other investment themes given the need to ensure products and services are market led and fit the brand attributes that define England's Classic Resort. Within the context of the Visitor Economy theme, the investment strategy sets out the following priority areas that will need to be

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implemented through this strategy in conjunction with the work currently being prepared by Locum and Blue Sail:-

- Focusing Southport's tourism offer toward a defined target audience.
- Maximising opportunities from the Southport Marine Park development.
- Retail Development.
- Developing the Resort's Cultural Offer.
- Defining the Classic Resort brand.
- Skills & training.
- Spreading the benefits of the Visitor Economy.
- Business Tourism.
- Increasing short break markets.
- Information Technology.

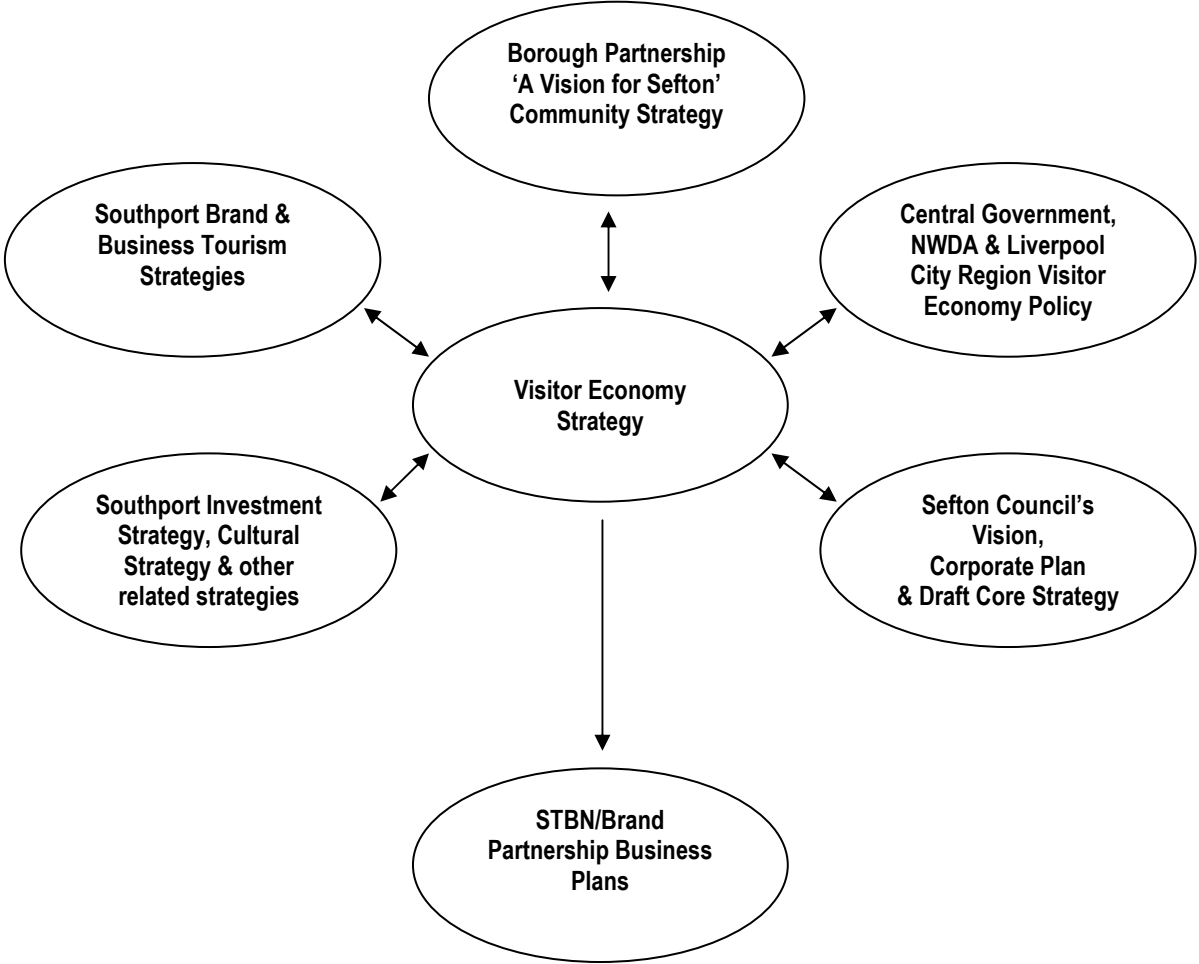
Sefton Coast Tourism Development Plan 2005 - 2008

Shortly to be updated, the tourism development plan recognises that the natural and leisure/recreational offers of Sefton's natural Coast will add significantly to Southport's tourism product in terms of adding to the diversity of the resort's core visitor product. To date the strategy has been successful in implementing the Sefton's Natural Coast brand and marketing strategies. Similarly it has provided the basis for access, interpretation and waymarking projects that have been essential in strengthening the appeal of the coast to day visitors and specialist tourism markets.

Other Strategies

Other strategies that need to be integrated into the Visitor Economy Strategy include Sefton Council's Corporate Plan, Sefton's Cultural Strategy, the Local Transport Plan, the emerging Retail Strategy and others. This will be an evolving process over time, particularly as new key strategic documents are published and existing ones revised.

Relationship to National, Regional & Local Strategies



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3.0 SWOT Analysis

Strengths	Weaknesses
<ul style="list-style-type: none"> • Comparatively wealthy community • Appeal to high spend customers • Lord Street & recent improvements to public realm • Kings Gardens & Seafront Infrastructure • Marine Lake • Reputation for specialist independent retail. • Substantial Conference Venue anchored by Southport Theatre & Convention Centre. • Recent investments in quality of accommodation stock. • Churchtown • Championship Golf Courses • The Flower Show • Strong Events Programme • Sefton's Natural Coast • Recognition as 2nd destination brand with the Liverpool City Region. • Birkdale Village • Breadth of Offer • Distinctiveness 	<ul style="list-style-type: none"> • Pockets of severe deprivation • Declining shopping experience • Small size of Town Centre Retail units • Lack of Town Centre development sites • Shabbiness of Seafront • Stalled development schemes – Scarisbrick Ave THI Scheme etc. • Problems resulting from night economy • Lack of poor weather attractions • Poor access and egress • Poor rail access from north & east • Quality of visitor welcome? • LA boundary issues • Not within easy reach of main transport links.
Opportunities	Threats
<ul style="list-style-type: none"> • Defining England's Classic Resort & RES Priority • 3 year ERDF funding agreement. • New conference facilities & ability to exploit new markets. • Focus on higher value markets. • Southport Investment Strategy, new branding & business tourism strategies. • Southport Marine Park, Marine Lake/Kings Gardens HLF Initiative • Traffic calming & upgrades to Lord Street • England's Golf Coast • Outdoor activities like cycling, walking and sailing • Southport Cultural Centre • Southport Market & creative industries. • Enhancing branded & independent retail offer. • Developing high profile events. 	<ul style="list-style-type: none"> • Short/medium term effects of world recession on visitor numbers, levels of spend and inward investment opportunities. • Further decline of retail offer, exacerbated by the edge of town development & traffic congestion on Lord Street. • Failure to match investment decisions with market need & Classic Resort brand values. • Failure to recognise the importance of investing in Southport's heritage & cultural assets to preserve sense of place and exploit key USP's • Competitor Activity - expanding retail offers of Liverpool One and Preston. • Organisational constraints. • Resource (funding & human) Constraints

4.0 WHERE DO WE WANT TO BE BY 2012?

4.1 Mission Statement

To continue the transition of Southport into the England's Classic Resort by building on the successes of partnership working to date, and by further establishing the resort's reputation as a premier destination for culture, leisure, business and outstanding customer service. In achieving that end, a shared policy for all stakeholders within Southport's visitor economy will be achieved to facilitate the creation of innovative and market facing products. This in turn will allow customer expectations to be surpassed and guarantee the longterm sustainability of the resort's visitor economy and its contribution to Sefton's economy and that of the wider Liverpool City Region.

4.2 Structure & Priorities

Given the breadth of Southport's visitor economy and the development work that needs to be undertaken, the action plan (detailed overleaf) splits activity over a 3 year period into the following development areas (DA):-

1. Advancing Southport's Visitor Economy
 - *Southport – Classic Conference Resort*
 - *Increasing quality and focus of Southport's Leisure Economy*
 - *Not Getting Complacent with Events*
 - *Visitor Welcome*
2. Destination Development.
 - *Priorities for Product Develop in the Visitor Economy*
3. Cross Cutting Themes
 - *A clear understanding of the customer and the market place*
 - *Investing in people skills and enterprise*
 - *Spreading the benefits of the Visitor Economy*
 - *Sustainable Southport – protecting the resort's future*

The priorities contained with DA1 relate to the delivery of sales & marketing activity that will be critical to sustaining and increasing visitor spend in Southport. Mirroring those priorities set out with the Liverpool City Region's Destination Management Plan (DMP) produced by TMP, this DA will guide business planning for Southport's conference, leisure, events and customer welcome products/services as a means of increasing day trips, short breaks and repeat visits. DA2 focuses on prioritising and implementing the recommendations for product development detailed with the Southport Brand Strategy and Visitor Economy Theme of the Southport Investment Strategy (see above). Finally, DA3 sets out 4 'cross cutting' priority areas that are designed to work alongside DA's 1 & 2 so that a holistic approach to the ongoing management and development of the visitor economy in Southport can be adopted.

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4.3 Objective Setting

In addition to the strategic drivers that have been outlined so far, outputs associated with key funding providers such as ERDF, NWDA etc will be used to inform objective setting and dictate how our resources are best utilised. Whilst funding opportunities for the destination development and cross cutting theme sections (DA's 2&3) will be ongoing throughout the lifetime of this strategy, financial support from ERDF (Partners for Growth) and NWDA (Business Tourism Development) has been secured to advance those priorities contained within DA1 (Advancing Southport's Visitor Economy) over the next 3 years. The headline targets for securing this funding relate to increasing visitor volumes and expenditures within Southport and will consequently, provide the main quantifiable objectives for this strategy – see below.

4.4 Partners for Growth - ERDF

The Partners for Tourism Growth initiative (PFG) is a unique project based on a partnership between TMP, Liverpool City Council, Sefton, St Helens and Wirral district councils. Using funding from the European Regional Development Fund (Action Area 3.3), it aims to drive forward a sustainable visitor economy that will make a significant contribution to the regeneration and competitiveness of Merseyside by building a sustainable tourism legacy following the 2008 European Capital of Culture programme. The initiative aims to develop the tourism sector through a focus on the natural & built environment of the City region together with support for planned investment in tourism facilities. The strategic objectives of the project are

- To increase the number of overnight visitors to LCR and the value of the spend generated by those visitors by encouraging them to spend more & stay longer.
- To raise the profile and performance of the LCR as a destination for short breaks & international visitors.
- To attract more day visitors to the LCR and improve attendance at festivals & events.
- Improve the awareness of the LCR as a visitor destination.
- To provide strategic direction & leadership of the tourism sector by the Tourist Board through the delivery of a co ordinate programme of marketing & events support and centralised, common approach to monitoring and evaluation of marketing & events impacts.

The Visitor Economy Strategy will provide the framework from which Sefton's element of the PFG programme will be taken forward over the period 1st July 2009 to 30th June 2012. Working to a budget of £1.7 million, the STBN will match ERDF with a proportion of Sefton Council's tourism revenue budget and private sector investment to implement the aims of this strategy (see section 1.4 Purpose and Aims). The initiative will also support greater collaborative working between stakeholders operating in the resort's visitor economy and TMP to help Southport access domestic and overseas visitor markets where appropriate.

ERDF has been secured on the basis that it will be used to improve the economic and social wellbeing of the Liverpool City Region. In the context of the PFG initiative, the project as whole is required to increase day & overnight visitors to the city region by 771,645 and increase related expenditures by £74 million during its lifetime. Additionally, the programme is expected to safeguard over 7.5K jobs and create an additional 1.6K jobs within the visitor economy, whilst achieving a net increase in GVA for the region of £35 million.

4.5 Business Tourism Fund - NWDA

The business tourism fund has been developed by the NWDA to help Northwest conference destinations compete more effectively within national business tourism markets. To reflect its position within the LCR business tourism sector, Southport has been allocated £80K for the next 2 years to enhance tactical marketing and sales activity targeting the national associations market. Supplemented by the PFG funding, the initiative will be matched by existing budget heads to enhance tactical marketing/PR activity, sales and delegate welcome initiatives via Southport's conference bureau.

Outputs

The headline outputs associated with securing the business tourism fund will rely on demonstrating the economic impact of additional conference business secured in delegate volume and value terms and will contribute toward the quantifiable objectives contained within this strategy. The grant also stipulates targets for PR value generated and venue participation within National accreditation schemes that will be progressed as part of the priorities included within the resort's business tourism business plan (see section 5.1.1 Strategic Priority 1).

As beneficiaries of PFG funding, stakeholders operating within Southport's visitor economy are charged with achieving a proportion of the headline outputs (see above) commensurate with the level of ERDF that has been secured. Combining these targets with those associated with the Business Tourism Fund, the headline objectives to be achieved during the lifetime of this strategy are set out below. These objectives will be supplemented by general performance management indicators associated with the individual elements of the Southport product offer (see section 7.2).

Business Tourism Fund:-

1. To achieve £1 million economic impact of conference business in Southport in 2010/2011
2. To achieve £12,500 equivalent advertising cost media coverage in Southport each year for 2009/2010 and 2010/2011
3. To increase number of participants in national accreditation scheme (MIA) in Southport by 3 by March 2011.

Partners for Growth

1. To increase leisure staying visitors to Southport by ** by June 2012 above the current baseline.
2. To increase day visitors to Southport by ** by June 2012 above the current baseline.
3. To increase expenditure among day/staying visitors to Southport from within the Northwest by £** by June 2012 above the current baseline.
4. To increase visitor expenditures generated by Southport's events programme by £1,515,610 million by June 2012 from the current baseline.
5. To create ** jobs within Southport's visitor economy.

** Outputs associated with visitor spend and jobs safeguarded will be confirmed by The Mersey Partnership (TMP) shortly.

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5.0 How Do We Get There? (Implementation)

Actions and Timeframes for Implementation

This strategy will build upon the successes of the existing STBN Alliance to provide a co-ordinated focus for activity within the visitor economy that will assist Southport's transition into England's Classic Resort. In so doing, it will use the strategic guidance detailed in the Southport Brand Strategy & Business Tourism Strategies (2009) to redefine and enhance Southport's tourism offer so as to appeal to new market segments.

Focussing on the development areas set out above, the following action plans prioritise activity for marketing, sales and investment activity with the aim of enhancing the competitiveness of Southport's visitor economy and adopting a market led approach to its continued regeneration. The lifetime of the strategy will be five years, however given the time limitations of European funding, the strategy will be reviewed during year 3 (2011/12) to evaluate performance and reprioritise activity where appropriate for the remaining 2 years.

To focus the work of stakeholders and interest groups a 3-year action plan has been developed. An 'X' has been used and marked in the action plan to signify when specific work within the visitor economy will either be carried out or considered. Timeframes for delivering associated activity will be fully dependent upon appropriate resources being available, year on year.

5.1 Development Area 1: Advancing Southport's Visitor Economy

5.1.1 Strategic Priority 1 – Southport the Classic Conference Resort

(DMP Priority 1 – To develop a class destination for conferences and business visits – so that the Liverpool City Region becomes a premier destination choice for association conferences of up to 1500 delegates.)

Intention:

- **To strengthen Southport’s position as a national conference centre that has strong appeal among conference buyers predominantly operating in the not-for-profit sector, regional associations and high value exhibitions markets.**

Rationale:-

Business and conference tourism have accounted for much of the recent growth in UK tourism and is responsible for some 29.6 million trips and £9,249 million spend in England. For Southport, business tourism brings valuable ‘off peak’ business in the form of conferences, meetings, exhibitions and dinners. Business visitors are typically higher spending than people on leisure trips generating approximately £73 million for the resort since 2005.

The importance of business tourism to Southport’s Visitor Economy cannot be understated, the recent investments to refurbish & extend the Southport Theatre & Convention Centre coupled with the opening of three new 4-star hotels, have meant the opportunities to target new markets and secure more business has never been greater. In moving forward however, stakeholders have to be aware that the industry is hugely competitive, and whilst Southport has raised its game in facility and quality terms, so have others.

Given these changes and the need to keep pace with rival conference destinations, Blue Sail Consulting on behalf of the STBN have recently completed a new business plan for Southport’s business tourism product. Aimed at improving Southport’s reputation and visibility, the plan sets out a clear framework for developing tactical marketing and sales activities to maximise business from key sectors such as the associations market. The plan also advocates that generating repeat business opportunities will be essential for raising expenditures and that new opportunities to penetrate the exhibitions sector must be taken if adequate returns on the product investments that have been made to date are to be realised. Finally, the plan emphasises the need for a destination sales team that is better equipped to co ordinate sales, PR and marketing activity with both local conference providers and through The Mersey Partnership.

In maximising the resort’s business tourism offer and the revenue it generates, stakeholders must recognise that this must not be done in isolation from the wider development of the destination’s visitor economy. Southport’s new brand & communications strategy, product development, skills, training and research initiatives will all play important roles in strengthening the profile of Southport’s business tourism offer and enable it to appeal to higher-spending target markets. Similarly the importance and quality of the destination’s leisure offer will add to the distinctiveness of the destination as a conference venue and there must be far greater collaboration at all levels to ensure a ‘market focussed’ approach is taken to securing future business.

Priorities	2009/10	2010/11	2011/12	2012/13
<p>1. Continue to enhance and develop direct sales activity in conjunction with TMP to penetrate the associations market with primary targets including northern government, political, trade union, professional & charity association markets. Key actions to include:-</p> <ul style="list-style-type: none"> • Monitor shortlist of competitor destinations & venues to identify potential clients. • Develop & deliver a new sub-national sales campaign through the use of PR, direct mail sales visits & fam trips etc targeting northern association buyers and PCO's. • Research, clean & prioritise the Southport destination database to facilitate more proactive approach for sales. This will include conducting ongoing desk research (web, trade press & use of other media etc), telephone research to check legitimacy of existing data & prioritising leads base on return on investment. • Develop new external sales & promotional events for buyers, including stand alone event for buyers in London, hosting networking events with industry members to increasing familiarisation visits to Southport. • Product Development – Establish voice within Southport Investment Strategy to ensure industry needs are heard and factored into the resort's ongoing regeneration programme. 	X	X	X	X
<p>2. Develop strategic approach to securing repeat business with a view to maximising number of 'high value' conferences/events taking place within the resorts annual conference calendar. Key actions to include:-</p> <ul style="list-style-type: none"> • Agree protocols and shared resources with the report's industry stakeholders to ensure attention to detail is maintained. This will include implementing minimum quality standards for familiarisation visits and client care before, during and after events, organising net working events to show case quality of offer and educate customer facing businesses about the importance of customer care. • Undertake customer satisfaction research including client feedback questions (agreed by stakeholders/service providers), delegate satisfaction surveys and to develop effective mechanisms of tracking & analysing results. • Adopt the principle of a 'Subvention Matrix' to move events to favourable diary spots as a means of maximising conference yield. Key actions will include identifying key conference dates for high value clients whilst proactively managing expectations of lower value clients. 		X	X	X
<p>3. To expand Southport's business tourism market by targeting higher value events. Key actions to include:-</p> <ul style="list-style-type: none"> • Develop initiatives to showcase new investment in resort offer within sales and marketing activity. This will include using new investment as lead message within sales & marketing activity. • Provision of marketing materials, copy images etc for stakeholder partners to use during destination sell, as well as developing networking & familiarisation events for all sales staff. • Empowering major hotels to lead on corporate sales for the destination – working with agents and developing niche 'products' for smaller 		X	X	X

Priorities	2009/10	2010/11	2011/12	2012/13
corporate meetings in partnership with local suppliers including golf days and team building events etc..				
4. Align the Southport conference product with the NorthWest Development Agency's Business Tourism Strategy to ensure a coherent and practical approach to enhancing the Business Tourism product in the NorthWest.	X	X		
5. Continue to uphold the 'code of practice' for Business Tourism through the criteria set out by the British Association of Conference Destinations.				
6. Through Sefton's Information Technology Strategy, continue to support an integrated programme of ICT development at all major conference venues within the resort. Specifically this will help support the potential development of Blue tooth technology & digital signage that will further enhance Southport's ability to attract those Northern Association buyers.		X	X	
7. Conference Marketing – Create and deliver an integrated and sector specific relevant marketing plan for 2009 – 2012 that will improve Southport's reputation & visibility with key markets including the Northern Associations market. Key actions to include:-	X			
<ul style="list-style-type: none"> • Utilise new Southport brand development work to guide business tourism branding and creatives. Key focus to be placed on incorporating the defined brand attributes of England's Classic Resort into business tourism promotional activity in terms of destination messaging and images. • Develop & deliver joint Sefton/TMP Southport specific marketing plan targeting primary markets identified by Blue Sail, commissioning specialist PR to raise awareness and visibility within the market (focussing on new investments), attend UK B2B exhibitions (Confex etc), identify opportunities for entering awards to raise profile & ongoing development of digital marketing plan to include continuous improvements to web site, regular e-marketing & use of social media. 				
8. Continue to implement a fully integrated delegate incentive scheme within the retail, restaurant and transport sectors to provide delegates with a positive 'Southport Welcome' (see strategic priority 4). The scheme will also provide incentives for delegates to return to Southport as leisure visitors at a later date, including the possible introduction of a dedicated conference 'smart card'.		X	X	X
9. To sustain the conference product post 2012.	X	X	X	X

5.1.2 Strategic Priority 2 – Increasing quality and focus of Southport’s Leisure Economy

(DMP Priority 2 – To promote the Liverpool City Region as a world class destination for leisure tourism – with a quality tourism offering and a top ten place in UK’s most visited towns by international visitors)

Intention:

- **Leisure Tourism programmes and initiatives to be highly market-focused, targeting and promoting Southport’s existing variety of products at appropriate markets**

Rationale:-

Leisure tourism is a fundamental component of Southport’s tourism economy generating somewhere in the region of £250 million in visitor spend per annum. Golf, events, retail, nature/recreational tourism, evening economy and food & beverage form the cornerstones of the resort’s leisure product that when combined with Southport’s unique heritage and emerging opportunities for arts & culture, provide a distinctive offer that will set the resort apart from others.

The definition of England’s Classic Resort brand is highly reliant on these product attributes both in marketing and product terms. Through extensive brand development work recently completed by Locum Destination Consulting on behalf of the STBN, clear direction now exists about how the leisure offer should be communicated to, and developed for, key audiences so they will be encouraged to visit for either short breaks or day trips. Whilst not seeking abandon traditional audiences, it is clear that if Southport’s visitor economy is to grow in the longer term, the resort’s leisure offer must continue to evolve and focus on meeting modern day customer expectations and preferences.

In leisure terms, the definition of England’s Classic Resort in recent years could have been construed as a ‘catch all’ brand that tries to mean all things to all people without actually saying anything at all! Our new approach to developing the England’s Classic Resort brand and the leisure offer that falls within it, will mean looking at the experiences Southport has to offer and creatig new, innovative and exciting ways of conveying and matching these experiences to the various segments of our target audiences. As the second destination brand on Merseyside, this will mean capitalising on Liverpool’s emerging status as a ‘world’ city for culture and heritage and using the England’s Golf Coast brand framework to raise the profile of the Classic Resort brand among national & overseas visitors. It will also mean developing a series of strong neighbourhood brands to reflect the depth and diversity of the resort’s product offer to key regional markets identified within the Ark Leisure segmentation model. Lord Street, the seafront, cultural tourism and the evening experience located along West Street, all possess, or have the potential to possess special experiences that will have resonance among audiences young and old.

This element of the strategy will seek to sustain marketing activity associated with Southport’s core leisure tourism offer, whilst placing greater emphasis on using the individual components of the resort’s tourism offer (for example high profile events, culture, retail/Lord Street & golf) to attract high value day & staying visitors, particularly from the short break and VFR market.

Priorities	2009/10	2010/11	2011/12	2012/13
1. Brand – Create new brand guidelines & brand architecture in line with recommendations detailed within Southport Brand Strategy 2009. Focus should relate to the development of England’s Classic Resort brand to reflect broad product attributes including Lord Street, Seafront offer and night-time economy. At the next level down, devise neighbourhood brand and architecture to support regional marketing activity & differentiating experiences among identified target segments.	X	X		
2. Day Visitors – Implement Southport brand strategy proposals to capitalise on the vast potential within regional markets for attracting day trip, VFR and tourism day trip (people who live outside the region but are on holiday staying elsewhere) visitors. Communications themes/messages to concentrate on the attributes of – Lord Street (culture, shopping, food, retail), high profile events, seafront & wider recreational offer etc. Key target audiences to include Cosmopolitan/Style Hound & Traditional/High Street segments aged 45+, High Street/Family segments aged 25 to 45 years) living within 1.5 hour drive time catchment area of the resort including Merseyside, Greater Manchester, North Wales, Cheshire and Lancashire Regions.	X	X	X	X
3. Develop tactical marketing activity to encourage regional day visits & overnight stays among younger Style Hound segments aged 25 – 35 years. Communications themes/messages to concentrate on Southport/West Street brand following improvements to bar/cub offer and development of night time events programme.			X	X
4. Staying visitors – Develop tourism products/packages with trade and tactical marketing initiatives to generate regional overnight stays. Key focus to be placed on growing the short breaks market for Southport’s general leisure offer (Lord Street/retail, food & beverage etc), accommodation offer, high profile events (Air Show, Summer Classics, Musical Fireworks etc) & golf product. Key target audiences to include Cosmopolitan/Style Hound & Traditional/High Street segments aged 45+.	X	X	X	X
5. National & Overseas Leisure Tourism Visitors – Continue to support & align thematic marketing initiatives with TMP/One Plan to promote the Liverpool City Region as a short break destination to national & overseas (European, US/Japan markets etc) visitors with Southport acting as a key destination brand. In reaching these audiences, local marketing strategy will need to recognise the importance of complementing the LCR lead theme of culture & heritage and the Liverpool attack brand principle. Suggested lead theme for Southport include new Cultural Centre, major events programme, golf & Grand National.	X	X	X	X

Priorities	2009/10	2010/11	2011/12	2012/13
6. Cultural Tourism – Working in conjunction with Sefton Council Arts & Cultural Services department, develop integrated approach to the promotion of Southport’s new Cultural Centre within generic resort marketing activity. As detailed in Southport brand strategy, this will include support for regional day trip & short break marketing, adoption/use of new brand guidelines for Southport by Arts & Cultural Services where appropriate & support for integration with the food & beverage, accommodation and retail sectors to create packages that will support short break marketing.	X	X	X	X
7. In line with Southport brand strategy and priorities set out above, develop new 3 year marketing plan to target leisure marketing activity at cosmopolitan (45+) and style hound (25- 35) segments & is in line with product improvements. Key focus of the plan will include <ul style="list-style-type: none"> Enhanced use of e-marketing activities defined with IT development plan – use of social net working sites, blue tooth technology, e-blasts, use of user generated content & SMS communications Creation of customer loyalty schemes to support customer data stock, yield & management. Development of resort web site to accommodate Enterprise Control Management System developed through New Mind. Evaluation on effectiveness, and strategy for printed collateral & exhibitions programme in reaching specified target audiences. Use of specialist PR (see below). 		X	X	X
8. PR – Develop PR policy that will support the proactive & targeted use of specialist PR to secure and reach specified target audiences. This will include features in national woman’s & men’s magazines (Elle, Vogue, Tatler, FHM etc), media relationship building (editors, travel writers etc) & developing innovative stories about Southport & it’s stakeholders that will help secure positive PR in regional & national press.	X	X	X	X
9. Golf – Increase exposure of Southport’s golf product to regional, national and overseas markets by working with TMP and realigning marketing resources and activity with geographically streamlines England’s Golf Coast (EGC) brand. Ensure that as part of the realignment process Southport is established as the ‘hero’ product within the EGC promotional activity and STBN Golf Sub Group has adequate representation with the EGC Partnership.	X	X	X	X
10. Recreational Coastal Tourism – Integrate tactical day visitor marketing activity (walking, cycling, bird watching etc) with the priorities contained within the Sefton’s Natural Coast Marketing Plan & HLF Landscape Partnership Initiative . Particular emphasis to be placed on the adoption/integration of the Sefton’s Natural Coast brand/message into generic resort marketing activity (holiday guide, pocket guide etc) as a means of adding further diversity to the Classic Resort product offer and attracting key regional target audiences within a 1.5/2 hour drive time to the resort/coast.		X	X	X
11. Group and Coach Travel Market – Continue to target coach and group travel markets within a 3 to 4 hour drive time catchment of Southport. In addition to existing promotional activity such as day visitor pocket guide, familiarisation visits, trade advertising and exhibitions etc, retain dedicated group sales function within the Tourism Department to support selected high profile events and new visitor attractions.	X	X	X	X

Priorities	2009/10	2010/11	2011/12	2012/13
12. Long Stay Visitors - Continue to recognise the long stay market place via co ordinated and integrated marketing campaigns.	X	X	X	X
13. To fully extend England's Classic Resort destination branding across all official (and non-official) leisure tourism communications & public realm works.		X	X	X
14. Develop a planned and regular programme of tourism research activity for Southport to 'fill the gaps' in terms of tourism market intelligence. Specifically, this will involve studies, benchmarking, campaign evaluation and visitor surveys – see priority 6.	X	X	X	X

5.1.3 Strategic Priority 3 – Not Getting Complacent with Events

(DMP Priority 3 – To develop the capacity of the City Region to host major events and to successfully bid for and stage major events that will profile the City Region and England's Northwest.)

Intention:

- **Continue to develop and promote a programme of events that establishes Southport as one of the Northwest's premier destinations for high profile events that in turn will support the image & profile of the Liverpool City Region.**

Rationale:-

Whilst Southport has a diverse tourism offer, it is arguably one of the leading event destinations in the Northwest. The Southport Flower Show, Jazz Festival, Airshow and Musical Firework Championships among others, provide an insight into how a diverse range of events can raise the profile of a destination and change visitor perception as well as making a significant economic impact. Attracting well over ½ million visitors per annum, the existing events programme must continue to evolve so that it does not lose touch with the needs & aspirations of the key market segments we are seeking to attract and crucially reflect the brand values associated with England's Classic Resort – both in terms of content & quality. Similarly, we need to think carefully about the role new events can play in further enhancing the profile of Southport as well as how they can be conceived to bring areas of the resort to life, encourage repeat visits and in sustaining visitor numbers off peak.

Southport is in a unique position when compared to other destinations in that it has invested a great deal of time and effort in developing events that are both commercially and environmentally sustainable. Consequently its reputation among professional events companies is growing in stature and must be capitalised upon to enhance the wide and diverse range of events taking place in the resort, as well as ensuring that key events spaces are utilised to their full potential. Stakeholders also need to think clearly and strategically about how events should be used to enhance the suite of products that make up Southport's leisure offer (retail, food & drink, golf etc) and to win business for our conference product, influence key opinion formers and to secure future investment.

Finally, events are 'relevant' on a number of levels. Whilst the commercial benefits are clear for all to see, on other levels they are tremendously powerful in engaging local communities and encouraging civic pride. Through initiatives such as the tourism volunteer programme, encouraging local interest groups to participate in our events and encouraging local residents to simply attend events, we begin to build a sense of community that benefits the overall visitor experience as well as encouraging visits from their friends and relatives. Consequently, this element of the strategy will focus on enhancing existing, and introducing new events to reinforce these aspirations as well as attracting high spending visitors from key target audiences.

Priorities	2009/10	2010/11	2011/12	2012/13
1. Continue to deliver a diverse and quality driven events programme, backed by co ordinated marketing activity so that returns from day and staying visitors are increased year on year.	X	X	X	X
2. Continue to Introduce 'commercial realism' into the development of core activity (Southport Air Show, Musical Fireworks, Summer Classics, Southport Food & Drink Festival etc) so that a commercially sustainable events programme continues to exist following completion of the Partners for Growth programme (June 2012).	X	X	X	X
3. Continue to work with tourism stakeholders in Southport to develop existing events as a mechanism for raising visitor expectations and perceptions of Southport as a vibrant, exciting and cultural destination. Specifically this will include investments in:-				
<ul style="list-style-type: none"> • Southport International Jazz Festival: <ol style="list-style-type: none"> 1. Encourage higher profile artists to enhance programme credibility in conjunction with Arts & Cultural Services. 2. Replicate Cork international Jazz Festival model for development of 'festival club' element in conjunction with accommodation sector. 3. Continue to expand town centre business participation. 4. Utilise other public spaces in Lord Street for daytime performances – Lord Street gardens, band stand, Kings Gardens etc. 5. Reintroduce community/jazz jam programme. 6. Work with Southport Melodic Jazz to develop clear rationale for the structure and promotion of the International Jazz festival and the SMJ Winter Festival. 		X	X	X
<ul style="list-style-type: none"> • Southport Air Show: <ol style="list-style-type: none"> 1. Continue development of quality driven 'landside' village component & participation of related major brands – BMW, Liverpool John Lennon Airport, KLM, Manchester Science & Industry Museum etc. 2. Investigate increased usage of Victoria Park to provide parking provision and incorporate elements of Air show ground experience. 3. Continued investment in diversity of flying programme - including static aircraft displays and use of beach landing strip. 4. Strengthening partnership arrangements with Liverpool John Lennon Airport/major carriers. 5. Working with RAF to increase their reliance on the Air Show for recruitment in the North West. 6. Continue to exploit corporate hospitality markets. 	X	X	X	X
<ul style="list-style-type: none"> • Southport Flower Show – Support the Southport Flower Show Company Limited to position the event as the leading independent & friendliest flower show in the UK with an appeal to a broad cross section of the public by 2013. 	X	X	X	X
<ul style="list-style-type: none"> • Southport Food & Drink Festival <ol style="list-style-type: none"> 1. Expand footprint of festival & improve links across the town centre. 2. Build on success of the tour of Britain Cycle Race and investigate the feasibility of utilising carriageway space on Lord Street. 		X	X	X

Priorities	2009/10	2010/11	2011/12	2012/13
3. Develop 3 year partnership agreement with Taste of the Northwest Ltd, local restaurateurs & Sefton Council aimed ensuring the long term sustainability of the event post 2012.				
<ul style="list-style-type: none"> • Summer Classics: <ol style="list-style-type: none"> 1. Continue to develop relations with private sector to secure high profile performances on Friday/Sunday evenings of the concert series. 2. Investigate potential of joint venture agreement with the Southport Flower Show limited with regards to long term development/sustainability of the event. 3. Confirm ongoing support of the Royal Liverpool Philharmonic Orchestra for the Summer Classic concert series and begin assembling option for long term development of the classic element of the event. • Southport Comedy Week: <ol style="list-style-type: none"> 1. Retain current format of festival. • British Musical Firework Championships: <ol style="list-style-type: none"> 1. Consider alternative site options within resort to consolidate and ensure long term sustainability of the championships as well as sustaining economic impact – subject to logistical and cost constraints, options include seafront/pier & Victoria Park. 2. Develop business case for pyrotechnic conference before and during championships. 3. Continue to develop corporate hospitality options 		X	X	X
4. Facilitate the development of new events that add diversity and appeal to the resorts events offer as well as supporting the wider brand attributes associated with Classic Resort. Specifically, this will include:-				
<ul style="list-style-type: none"> • Summer programme of cultural events activity located within key public open space on Lord Street. • Development of major golf festival with in Victoria Park linked to England's Golf Coats and developed in conjunction with the Southport Flower Show Ltd. • Development of major 3 week Christmas retail event focussing on Lord Street to supplement promotional activities and help Southport compete with other retail centre within the NW during this important period. • Support for major cultural activity with resort's creative quarter and within main Southport Cultural Centre programme. • Sport - Develop strategy for the bring regionally significant sporting events to key spaces in Southport – Lord Street, Victoria Park, Marine Lake and beach. 		X	X	X
5. Continue to enhance customer services allied to the events programme by continuing to develop new media initiatives (online/e-ticketing, sms ticketing, advance online & computerised booking facilities in conjunction with Arts & Cultural Services), group booking packages and improved scheduling of forth-coming events activity.	X	X	X	X
6. Work strategically with TMP, Liverpool City Council and associated partners to develop regional and national events led marketing initiatives that	X	X	X	X

Priorities	2009/10	2010/11	2011/12	2012/13
include selected high profile Southport events (Southport Flower Show, Southport Air Show etc) & the Grand National as a mechanism of increasing hotel occupancy levels and spend within the resort. In addition work with Liverpool City Council to grow district events based on the legacy of Capital of Culture and associated promotional activity that is 'pan Mersey' focussed e.g. the Mersey River Festival & Matthew Street Festival.				
7. Develop funding opportunities to support the ongoing development of the event Volunteer Programme in conjunction with Sefton CVS.	X	X	X	X
8. In conjunction with the Conference & Corporate Sales Section, Economic Regeneration & TMP, use high profile events as strategic mechanism for engaging opinion formers, travel writers, potential investors and media editors within the Northwest and beyond to support ongoing regeneration efforts in Southport and growing credibility of the report's corporate offer.	X	X	X	X

5.1.4 Priority 4 - Visitor Welcome

(DMP Priority 1- To continue to develop a public realm that is an asset to the visitor experience and sets new standards of maintenance. DMP Priority 2 - To provide a quality offering to all visitors to the City Region, capitalising on the natural friendliness of local residents to offer outstanding customer service).

Intention:

- ❑ **Customer Service - To provide the visitor with an integrated ‘tourist information’ network, providing the customer with sparkling customer service standards and high quality information.**
- ❑ **New technology - Southport to be recognised as a leader in technologies, recognising and anticipating new opportunities in the tourism market place, resulting in improved communications with customers and stakeholders.**
- ❑ **A resort destination for all visitors – Developing Southport’s reputation for welcoming all visitors.**

Rationale:-

Essentially England’s Classic Resort brand is made up three main components comprising the visible brand/logo that will be used persuade people to come the resort, the quality of product offer (golf, retail, food & beverage, natural & build environment) that visitors will experience when they get here and the quality of welcome they receive during their stay. The visitor welcome ranges from the friendliness of local residents and the quality of service received from the breath of people working on the ‘front line’ (taxi drivers, hotel receptionists, waiters etc) to the accessibility of new technology that will make their visit convenient, memorable and most importantly enjoyable. Importantly, the quality of welcome should be extended to all visitors irrespective of their social graded, age, ethnic origin or sexual orientation.

These particular attributes are critical parts of the Classic Resort brand and require investment, time and effort dedicating to them so that customer expectations created through our promotional literature and PR can genuinely be realised. Since Southport’s last tourism strategy was agreed in 2005, there have been huge advances in progressing the resort’s visitor welcome including the development of our dedicated volunteer programme, the creation of Sefton Tourism Skills business plan and more recently Sefton’s Visitor Economy Information Technology Plan. Whilst many of the projects contained within these documents are still in their infancy, they provide a clear, and informed direction for the destination to follow (in policy & development terms) in creating a benchmark that is consistent with a classic resort and in maximising visitor expenditures. In the context of this work and the Liverpool City Region’s priorities for developing customer service in general, this section of the strategy sets out our key priorities for action over the life time of this plan.

Strategic Emphasis	2009/10	2010/11	2011/12	2012/13
<p><input type="checkbox"/> Customer Service</p>				
<p>1. Develop proposals & secure funding to move and refit TIC within Southport Cultural Centre by 2012.</p>				X
<p>2. Continue to evolve accommodation booking service through MERVIN (Merseyside Visitor Information Network) and increase participation of Southport's accommodation sector.</p>				
<p>3. Classic service – make quality of service a central feature in Southport's Classic resort positioning across all sectors – Support programmes aimed at sustaining the quality agenda – in particular VAQAS (Visitor Attraction Quality Assurance Scheme), MIA (Meetings Industry Association) Hospitality Assured Programme etc. Provide information and advise to improve awareness of the Disability Discrimination Act (DDA) and support/connect to 'Liverpool City Region Welcome' programmes etc.</p>				
<p>4. Based on Sefton volunteer training scheme & the family of 'Welcome To Excellence', customer care schemes, develop training sessions twice yearly targeting new & existing front line staff. Targeting taxi drivers, hotel staff, traffic wardens, gardeners, street cleaning staff, volunteers, retail staff on Lord Street etc, the sessions will be structured to familiarise staff with the product/Classic Resort offer, service standards and their ambassadorial role within the resort.</p>		X	X	X
<p>5. Support branding of Southport as a Classic Resort by working with TMP to improve world class service, behaviour, motivation and knowledge of people working in Southport's tourism industry (see also Priority 7 – Investing in People, Skills and Enterprise) .</p>		X	X	X
<p>6. Continue to provide a comprehensive distribution system to ensure all official tourism literature is available at key welcome points around the resort (train/bus stations, theatres, hotels etc), electronically and is effectively disseminated at regional, national and international levels – as appropriate to the target market.</p>	X	X	X	X
<p>7. Work in partnership with Tourist Board/TMP and STBN members to encourage Southport's accommodation sector to attain the new Common Standards for Assessment being introduced by the AA & Visit Britain (Quality in Tourism). In helping achieve that end, the 'inspected-only' policy will continue to be implemented before accommodation is included in official tourism media/visitor information services (holiday guide, accommodation booking service, web etc) so as to ensure minimum standards for accommodation are met.</p>	X	X	X	X
<p>8. Work with the resorts hoteliers, restaurateurs and publicans to raise standards and increase inclusion in independent tourism guidebooks such as the Blue Guide, Good Hotel Guide, Good Food Guide and Good Pub Guide.</p>	X	X	X	X
<p>9. Regularly liaise with the local Tourist Guides Association to ensure that guides receive up to date information on Southport and regularly feedback on tourist views of the town.</p>	X	X	X	X

Strategic Emphasis	2009/10	2010/11	2011/12	2012/13
10. Ensure appropriate official Southport Tourism literature is widely available at key outlets in the town, to cross sell the visitor offer and to manage visitors effectively around the town, retaining them for longer periods.	X	X	X	X
11. Continue to support Coach Host & Tourism Volunteer programmes.	X	X	X	X
12. In conjunction with TMP & NWDA, lobby Visit England to complete licensing agreement with Trip Advisor and seek out alternative methods of linking visitsouthport.com to user generate destination reviews.	X	X	X	X
□ New Technology				
1. Implement recommendations of Southport Information Technology Strategy, including:- <ul style="list-style-type: none"> • Web Management & Quality Assurance - Development of resort web site to accommodate Enterprise Control Management System developed through New Mind; creation of 'web editor function coupled with appropriate back office support, creation of 3-year editing and optimisation plan for visitsouthport.com & developing relations with Avarto & New Mind to enhance web performance. • Web Enhancement – In conjunction with Avarto & New Mind develop detailed proposals for enhancing functionality of visitsouthport.com including provision of weather & tide information, increasing use of DMS rich media content, online product packaging & use of electronic venue planning software to improve usability of main conference web site. • Improving Customer Information – Work in conjunction with Arts & Cultural Service & Southport Flower Show to advance Arts About Manchester/NWDA proposals to develop an interoperable ticketing/customer data solution for Southport events programme. Desired outcomes will include the creation of a mobile/online/face to face ticket sales system, reserved/unreserved ticket facilities, customer data storage/segmentation functionality and capability to support e-marketing initiatives – e-blast, SMS texting etc. • Creation of Online shop at visitsouthport.com • New Technology – Including implementation of blue tooth messaging devices at key locations including Southport Theatre & Convention Centre, Esplanade Park & Ride, Splash World, TIC/Cultural centre etc; developing MP3/pod casts to enhance thematic/online marketing, conference sales, walks & cycling tours of Southport & Sefton's Natural Coast (in conjunction with Southport Cycle Town initiative). • Digital Signage – Assess the potential for internal & external plasma/digital signage device(s) within STCC, TIC and other key locations to enhance conference delegate information and support familiarisation trips; continue to establish feasibility and cost of road side digital signage to replace existing gateway signage at Kew and Plough roundabouts. 		X	X	X

Strategic Emphasis	2009/10	2010/11	2011/12	2012/13
<p><input type="checkbox"/> A resort destination for all visitors</p>				
<p>1. Develop partnerships with specialist providers to raise issues of accessibility with the local tourism industry. In particular, work in partnership with the 'Tourism for All' initiative to provide advice on legislation concerning the Disability Discrimination Act.</p>	X	X	X	X
<p>2. Undertake planned, regular, access audits of local public tourism provider facilities and premises, in partnership with the Regional Tourist Board/TMP, the voluntary sector and Sefton Council Equal Opportunities officers.</p>	X	X	X	X
<p>3. Ensure that official Southport tourism literature incorporates up to date access information each year, including information on local bus operators offering low-floor accessible entrances and the Shopmobility scheme.</p>	X	X	X	X
<p>4. Enhance co-ordination and customisation of information tailored to meet the needs of all, including people with particular requirements in accessing information (braille, large print, loop system), and public tourism venues.</p>	X	X	X	X

5.2 Development Area 2: Destination Development

5.2.1 Priority 5 – Priorities for Product Development in the Visitor Economy.

Intention:

- **Position Southport as the England’s Classic Resort by strengthening and introducing a more competitive, quality driver product ‘offer’, for both existing and emerging markets.**

Rationale:-

In 2004 Southport embarked on its ambitious journey to become the Northwest’s and then England’s Classic Resort. Since that time over £200 million worth of investment has been made to upgrade the resort’s tourism infrastructure that included the expansion of the Southport’s conference centre & theatre, the building of new four star hotels, refurbished pier and public realm improvements along Lord Street to name a few. Despite all this success, reduced sums of public funding combined with dented private sector confidence (due to the global economic down turn) means that clear focus on adopting ‘market facing’ solutions to lever in future investment in the resort’s product offer and consolidate its current position must take priority. In so doing, the definition of the Classic Resort brand must be further defined to make local residents, stakeholders, visitors and future investors alike understand our vision and realise the huge potential the destination’s visitor economy has, the kinds of audiences it must seek to attract and those areas where improvements are still needed.

In meeting this challenge, the Southport Brand Strategy (Locum Destination Consulting) was completed in June 2009 and forms the focus for the implementation plan of the Southport Investment Strategy Visitor Economy theme. Building on the investment strategy’s concept of creating distinctive neighbourhoods in Southport, the brand strategy provides detailed guidance about developing the ‘fine grain’ of these business clusters and provides all stakeholders with responsibility for making it happen – Council Planners, Tourism Teams and the private sector partners. Central to this is the acceptance that creating customer-facing products will provide the foundations on which a successful destination brand can be created and should take precedence in guiding the resort’s ongoing regeneration. To that end, enhancing existing and creating new visitor experiences within Southport will be undertaken on a ‘block by block’ basis so that decision making can be informed, regeneration activity can be prioritised and crucially stakeholders have the ability to input into this process.

In strategic terms, it is crucial that we recognise the importance of Lord Street in providing a unique and distinctive heritage offer that differentiates the resort from rival destinations. However if we are to progress the visitor economy both commercially and environmentally, then new thinking around how we make the most of this unique space must be considered for the sake of the resort’s future prosperity. Consequently our ability to attract the right mix of branded & independent retail into the area will be central as will improving the ambience of Lord Street and making it work harder to connect the town centre with its seafront. Perhaps most importantly, the collective responsibility on us all to conserve and maintain a pristine built environment within this area of the town

provides us with a real opportunity to create a distinctive sense of place in which residents and visitors alike feel special.

The opportunities to harness the potential of the arts & creative industries through the Southport Cultural Centre initiative are also crucial and provide the catalyst from which the development of the resort's cultural offer can be developed, providing renewed focus for independent retail along Market Street & King Street. Similarly, reinvigorating Southport's night-time economy is a priority given the need to encourage younger visitors (21 – 35 yrs) to the resort and the high per capita expenditures they bring. The current offer falls below par, both in the diversity of quality product offer and the perceived fear of crime that is sadly blighting the sector's ability to meet the brand values associated with England's Classic Resort and to capitalise on the stylish, aspirational offer for which the town has a growing reputation.

Finally, Southport's seafront has the potential to unlock further opportunities for the resort if future development is innovative and bold enough to meet the aspirations of modern day mass market visitors, whilst providing year round facilities that will generate additional spend from which the local economy can grow. Investments in the Ramada Plaza Hotel, the Southport Theatre & Convention Centre, the Marine Way Bridge set the benchmark for which the redevelopment of the rest of the seafront must seek to emulate. However, this must be done sensitively and aim to rejuvenate the distinctive heritage features of the resort's seafront, particularly Kings Gardens as well as ensuring there is investment in those streets that link the seafront to Lord Street.

The values set out in the brand strategy will underpin much of this work and will be used to focus regenerative activity on creating high quality experiences capable of matching the brand attributes of England's Classic Resort whilst appealing to the most lucrative market segments.

Given uncertainty of time scales and other factors associated with intensive capital regeneration, the breadth of these projects clearly goes far beyond the scope of this strategy and will be reliant on the implementation of planning & transport policy coupled with external support from organisations such as the NWDA & Heritage Lottery Fund. However such is the scale and importance of the visitor economy to the Southport's economic & social wellbeing, the brand strategy will be used to influence and prioritise a number of key themes/projects/initiatives contained within the SIS. As a result, the visitor economy initiatives contained within this strategy will be developed in conjunction with the thematic groups comprising the SIS and seek to deliver the following outcomes over the next three years.

Strategic Emphasis	2009/10	2010/11	2011/12	2012/13
<p>1. Local Development Framework - Incorporate key recommendations & general development principles of the Southport brand strategy within Southport Town Centre Supplementary Development Plan (SPD) in order to create a supportive planning policy framework that will; a) rationalise the delivery of key elements/themes within the Southport Investment Strategy; b) provide an effective mechanism for stimulating investment in the development of the town centre's visitor offer. This will include:-</p> <ul style="list-style-type: none"> • Buildings, Streetscape & Public Realm – <ol style="list-style-type: none"> 1. Develop a local design code that reflects England's Classic Resort brand guidelines (developed under strategic priority 2) for signage, street furniture etc. 2. Set out clear parameters & priorities to conserve Southport's unique heritage character and developing the resort's distinctive sense of place. Key areas for consideration must include preservation & maintenance of built architecture of Lord Street (including canopies & shop fronts), parks & gardens (Kings Gardens, Victoria Park) & seafront/town centre connecting routes including Scarisbrick Avenue & Neville Street. 3. Priorities for the creation & design of spaces within the public realm that will support increased town centre events, designer retail experience and improvements to the resort's night-time economy offer. • Character Areas & Quarters – Support development of eight neighbourhood quarters (as set out within the brand strategy) to align regeneration policies of Sefton Council and private sector developers with the needs/aspirations of identified target audiences. This will include developing policy to implement the 'block by block' approach (in conjunction with landlords & tenants) to build on the identified character areas making up Lord Street, as well as the smaller area offers within the town centre which include the proposed market zone, night zone & Scarisbrick Village etc. • Retail - Focussing on the zoned/neighbourhood brand offers contained within the brand strategy, planning policy must encourage retail development that integrates with the resort's existing urban fabric as per the 'experience retail' principle - combining retail with leisure, entertainment & culture to create a visitor experience that is wider & richer than just the retail offer alone. More specifically, the policy should emphasise the need to encourage infill retail development within the 'fine grain' of individual buildings, streets & grouping of streets together with site assembly opportunities (vacant units, floor space options, development land) to attract national mid-upper range multiple shops in the immediate vicinity of Lord Street (potential sites could include vacant Woolworth's building, areas around Wayfarers Arcade & Cultural Centre). • Accommodation – Establish a flexible policy toward the change of use of the resort's existing stock of small hotels & guest houses for high quality commercial or residential accommodation. <p>2. Priorities for Retail Development – Upgrade quality of the resort's retail offer in line with the brand strategy to enhance the diversity of the overall product offer to attract high value audience segments. Key priorities during the lifetime of this strategy will include:-</p> <ul style="list-style-type: none"> • Experience Retail/Major Retail Development – In conjunction with key partners, undertake major feasibility study to identify sites within the immediate environs of Lord Street that will:- 	X	X	X	X
		X	X	X

Strategic Emphasis	2009/10	2010/11	2011/12	2012/13
<ol style="list-style-type: none"> 1. Provide required floor space to attract major 'on brand' retail – including amalgamation of vacant units and use of upper floor space. 2. Strengthen the mix of retail, leisure & entertainment uses to support the concept of 'experience retail' development in Southport. 3. Consider development options that reflect the 'block by block' approach to the development of the resort's predefined character areas. <ul style="list-style-type: none"> • Large Retail Brands: Central Lord Street & Chapel Street– <ol style="list-style-type: none"> 1. In conjunction with SIS Town Centre Management Thematic Group, map empty retail units and identify those sites that have the potential to increase footfall to support independent retail offer– particularly focus for attention includes key sites on Lord Street and Chapel Street. 2. Based on guidance offered in brand strategy & in conjunction with SIS communications strategy, increase number & range of 'on-brand' national multiple shops operating in the mid-upper range of the market by targeting desirable operators/commercial agents & developing proactive relations with property landlords. 3. In conjunction with Sefton Council's Planning & Economic Regeneration Department investigate the feasibility of developing tenancy incentives packages & other support from Sefton to incentivise relocation opportunities – e.g. staff training, development & recruitment offered through Sefton@Work, specialist grants, resort's retail performance & clear message about vision/'experience retail principle' etc. • Specialist/Independent Retail: Market Street, Scarisbrick Avenue & Central Lord Street – <ol style="list-style-type: none"> 1. In conjunction with SIS Town Centre Management Thematic Group establish empty retail units and encourage clusters of 'character' independent retailers on Market Street, King Street & Scarisbrick Avenue. 2. Encourage greater breadth of on-brand specialist retail on Lord Street/Wayfarers Arcade such as designer bag or shoe stores. 3. Develop strategies that are conducive to relocation of existing tenants into appropriate business cluster area to encourage critical mass through 'block by block' development approach. 4. In conjunction with Sefton Economic Regeneration Team/SIS Business Support Thematic Group, align existing grants incentive schemes and target new business grant opportunities to support the development of specialist/independent retail. 5. Develop relationships with landlords/commercial letting agents to develop a strategy for 'pop up' retail within vacant shop units. • Experience Retail – Consider the potential for the creation of an Experience Retail Development Group, comprising champions/representatives composed of land owners and retailers, to guide and develop 'block by block' proposals for the introduction of a greater mix of retail, leisure & entertainment used. • Business Improvement Districts (BIDS) – Work in conjunction with Southport Business Enterprise to develop case for and kick start BIDs for Chapel Street & Lord Street given the renewed impetus provided by the Southport Investment Strategy and the 				

Strategic Emphasis	2009/10	2010/11	2011/12	2012/13
Southport Brand Strategy.				
<p>3. Night-time Economy – Revise existing Evening Economy Strategy (2004) to capitalise on the exclusivity of Southport’s existing night time economy and develop initiatives for attracting new operators, improving night time environment and tackling issues around anti social behaviour. Key priorities will include:-</p> <ul style="list-style-type: none"> • Defining development area/zone for principle night time offer as Coronation Walk, Waverly Street & West Street. • Develop strategies for improving mix of tenant/operators that will help establish a ‘cultured’ & ‘chilled’ environment able to enhance the attractiveness of the destination to high value younger markets. • Develop relations with existing operators to conceive and progress the development of the night time economy with a view to advising over public realm, lighting and support for targeting ‘on brand’ operators. • Work in partnership with existing operators & Southport’s Community Safety Area Partnership (CSAPS) to develop initiatives around tackling the actual and perceived issues that relate anti social behaviour (rowdy/threatening behaviour) in the resort’s evening economy. • Develop strategy with Planning & Economic Regeneration Department to consider range of permissible uses for vacant sites/premises within Night Time Zone as a means of supporting proactive searches for new operators. • Build on existing licensing policy that encourages operators not to tolerate or encourage undesirable behaviour among its customers, developing events & to encourage appropriate behaviour among customers. • Develop potential of creating Business Improvement District within night time zone as a means of improving cleansing, strategic development of the area, greater stakeholder representation & promotional activity • Develop be spoke public realm & lighting strategy for the night time zone that will enhance the areas identity/sense of place and improve safety. 		X	X	X
<p>4. Arts & Creative Industries – In conjunction with the development of the new Cultural Centre and development of Southport’s market operation, develop strategy with key stakeholders to guide the development of creative industries around the environs of Market Street & King Street (proposed cultural quarter). Key priorities include:-</p> <ul style="list-style-type: none"> • Develop relations with landlords & commercial letting agents to ascertain potential development sites within the cultural quarter – including buildings & land plots that can be combined/converted to provide workspace, studio space & exhibition space for the broad range of businesses that comprise the creative sector - craft, design, photography, visual arts etc. • Establish Cultural Quarter Group including local arts practitioners, Southport Cultural Centre, Southport Market, landlords & business support services to guide the strategic development & management of the cultural quarter. • Develop strategy to attract anchor tenants for the cultural quarter and opportunities for easy in/out rental agreements to new entrants (graduates local community arts groups etc) into the industry. • Build relations with local arts colleges. • In conjunction with Economic Regeneration & Business Link, develop financial support & advise packages design to help creative 		X	X	X

Strategic Emphasis	2009/10	2010/11	2011/12	2012/13
industries set up/relocate to the defined cultural quarter. <ul style="list-style-type: none"> • Support development of social enterprise initiatives and associated opportunities for employment, education & skills development within the sector. 				
5. Transport Policy – In conjunction with SIS Transport theme, develop the following proposals:- <ul style="list-style-type: none"> • To enhance the visitor experience and capitalising on the potential of Lord Street to significantly enhance the quality of Southport’s economy, undertake feasibility studies to investigate the options for creating an environment that is pedestrian friendly. • Develop integrated public transport systems get visitor to, and move them around Southport effectively –pedestrian and cycle route improvements (Southport Cycle Town Initiative). • Work with West Lancs Council to improve easterly access to Southport through the implementation of improved traffic management systems in Ormskirk. • Expansion/upgrading of park and ride facilities & lobby to upgrading quality and speed of the easterly bus/train service to Southport. 		X	X	X
6. Seafront Development - Support long-term objectives aimed at improving the quality of resort’s seafront offer & improving the linkage between Southport Town centre with its seafront. Key priorities for development during the lifetime of this strategy will include:- <ul style="list-style-type: none"> • Progressing design competition and development of Southport Marine Park to reflect Southport Brand Strategy and expectations of key target audiences. • Develop stage 2 submission for Kings Gardens HLF programme. • Work with Southport Flower Show Limited to realise the potential of Victoria Park. 	X	X	X	X
7. Communication Strategy - Based on the aforementioned priorities, devise communication plan that will raise the profile of, and promote understanding about the Southport Investment Strategy to key audiences – local residents, local business, stakeholders & potential investors. The core objectives for the communications strategy will be aimed at:- <ul style="list-style-type: none"> • Galvanising public, private & voluntary sector support for SIS through clear understanding of vision and desired outcomes. • Conveying an innovative & holistic approach to social & economic regeneration. • Promoting confidence in Southport & develop the climate for inward investment at all levels. • Developing an ‘inclusive’ approach to Southport’s ongoing regeneration capable of maximising economic and social returns. 		X		

5.3 Development Area 3: Cross Cutting Themes

5.3.1 Priority 6 – Intelligence Led: A clear understanding of the customer and the market place

Intentions:

- ❑ **To ensure that data collection systems are in place to capture key visitor information and enhance customer relationship and destination management capabilities.**
- ❑ **To have a planned, regular, funded programme of tourism market research for Southport, focussed on ‘filling the gaps’ in tourism knowledge that existing data collection programmes cannot fill. Be one-step ahead, anticipating new and future market developments and trends.**

Rationale:-

A clear understanding of the customer and the marketplace will be essential if informed decisions about the promotion and development of Southport’s tourism sector are to be made and gaps in visitor knowledge filled. Through the implementation of Southport tourism data management plan in 2006, there have been significant improvements in the collection and dissemination of performance data relating the resort’s visitor economy including that collected through MERVIN (Merseyside Visitor Information Network), attraction’s, accommodation providers, TIC enquiries and via the internet. This in turn has helped to improve the accuracy of the volume and value data provided by STEAM (Scarborough Tourism Economic Activity Monitor) and the quality of local information available to evaluate the year on year performance of Southport’s visitor economy.

From a qualitative perspective the use of destination benchmarking and events surveys are also crucial in showing how effective promotional activity has been in attracting target audiences, recording satisfaction levels and in assessing whether the quality of our offer matches expectations. Importantly, this type of research also shows how Southport’s visitor offer compares to that of competing destinations and where improvement is required to reach the Classic Resort standard.

Despite these successes, it is essential that we do not become complacent and constantly strive to improve our visitor knowledge base so as to keep pace with changing customer expectations and preferences. At present, large gaps exist in the provision of visitor information that will constrain our ability to gauge the performance of some sectors of the resort’s visitor economy. As an example, the ability to forecast hotel occupancy levels and identify the times where excess capacity exists in the accommodation sector is being restricted through the lack of accurate & up to date information. Similarly, our failure to measure visitor footfall within the town’s retail centre is having severe implications for gauging performance against other comparable retail destinations and is limiting efforts to speak with confidence to new retail operators. From a market evaluation perspective we must also find new ways of evidencing the volume and value of visitors to the resort by market segment as a means of evidencing the returns on investment made in promotional and product development activity. Robust research

techniques to evaluate the environmental impact of activity within the Southport's visitor economy must also be developed.

Finally, such is the size and importance of the visitor economy to Southport, it is important that information is provided to evidence the contribution of the public purse in sustaining this vital element of Sefton's economy. From an environmental, social & financial point of view, the ongoing development of Southport's visitor economy will be of direct relevance to the quality of life of those living within its environs, therefore structuring appropriate research activity to measure the impact of these benefits on our local communities is now of crucial importance.

As a result of these issues, priorities for research activity will be structured as follows:-

Strategic Emphasis	2009/10	2010/11	2011/12	2012/13
<p>1. Data Management – Continue to operate Tourism Data Management Plan/centralised visitor information database for Southport and Merseyside tourism information providers –via MERVIN (unique user web enquiries, accommodation bookings, brochure requests, event ticket sales etc), local visitor attractions (TIC etc), registered coach statistics etc. Fill gaps in existing data provision as follows:-</p> <ul style="list-style-type: none"> • Occupancy Data – Develop monthly accommodation survey with TMP to provide occupancy information with participation from 6 hotels – key focus will be to evidence economic impact, room vacancy rates and associated residents expenditure patterns. • Town Centre Footfall Data – Commission Spring Board UK to install counting devices on Chapel Street & Lord Street to estimate town centre footfall numbers & benchmark against comparable UK destinations. • Coastal Data - Implement data collection programme with Sefton Coast & Countryside Service, National Trust & RSPB for 6 vehicle counting points located along Sefton's Natural Coast (Marshside, Ainsdale, Formby (2) & Crosby (2)). • Parking Data - Secure monthly data seats from key park & ride sites with Southport including the Esplanade Park & Ride & Fairways Park & Ride. • Events Data - Develop appropriate model for estimating/recording attendance levels at free events taking place in Southport. • Conference Data – Conduct regular conference research to establish volume and value of business being won by the conference bureau. 		X	X	X
<p>2. Volume & Value - In conjunction with key partners including TMP, provide annual volume and value estimates of performance in Southport's visitor economy:-</p> <ul style="list-style-type: none"> • STEAM (Scarborough Tourism Economic Activity Monitor) – In conjunction with TMP undertake annual programme of volume & value research activity for Sefton to show tourists staying in serviced accommodation/non serviced accommodation/with friends & relatives and on day trips together with associated impacts (economic, employment support, tourist days etc). Develop appropriate weighting to gauge headline performance for Southport's visitor economy. • Volume & Value by market sector – Investigate the potential of developing volume & value research using the Arkleisure 		X	X	X

Strategic Emphasis	2009/10	2010/11	2011/12	2012/13
segmentation model for Southport based on a) target market segment (Cosmopolitans, Traditional etc) & b) product segment - Events, Conference and Leisure Tourism (including coast & retail).				
<p>3. Qualitative Research - In conjunction with key partners including TMP, the Southport Flower Show & Sefton MBC Arts & Cultural Services, Sefton MBC undertake regular programme of sector specific primary research will include:-</p> <ul style="list-style-type: none"> • Coastal Research – In conjunction with Sefton Coast Partnership/Landscape Partnership Project & TMP conduct coast wide qualitative programme of research to gain user opinions, profile and expenditure. • Events Research – Commission Northwest Research Services (via TMP) to undertake site surveys at two events per year to support events development and evidence outputs connected with the ERDF Partners for Growth initiative. • Leisure Research – Commission destination benchmarking activity or similar to maintain focus and competitiveness of the resort's tourism offer & gauge profile of current visitors, expenditure & satisfaction levels. • Group Travel – Attitudinal survey work undertaken by coach hosts. • Cultural Tourism – Integrate research activity as appropriate with Arts & Cultural Services to ascertain the impact of Southport's emerging cultural product offer (cultural centre, creative sector etc) so that marketing and programming activity (exhibitions programme, performing arts programme) can be developed accordingly. • Online research – Develop existing e-database to structure ongoing programme of online research to increase frequency of consumer research as a means of informing future communications policy, aiding perception analysis and product development activity (e.g. developing evening economy, heritage offer etc). Key areas for development in this regard will include the resort's events programme, cultural and conference product offers. • Visitor profiling research – In conjunction with Arkenford, develop segmentation analysis of current visitor audiences allied to key publications including the resort holiday & pocket guide. • Conversion Research - to identify the percentage of people requesting & receiving a Short Breaks & Holiday Guide who then have visited / will visit. 		X	X	X
<p>4. Community Research – Utilise existing community based research and develop closer working relations with Sefton's Community Cohesion Service to commission new qualitative research aimed at assessing local perceptions of the visitor economy and the barriers (perceived & actual) preventing participation - fear of crime, youth disorder, rowdiness etc.</p>		X	X	X
<p>5. Support National, regional and sub regional research initiatives including annual Destination Performance UK baseline survey (coastal strand), Merseyside Tourism Survey, Tourism Business Performance Survey, Partners for Growth/ERDF Key Performance Indicator reports and Merseyside Visitor Surveys.</p>	X	X	X	X
<p>6. Secure funding for new developmental areas of primary research as appropriate – brand awareness, product development, the evening economy, heritage and other niche markets.</p>		X	X	X

5.3.2 Priority 7 – Investing in people skills and enterprise

Intention:

- **Work with partners including TMP, Sefton@Work and the Sector Skills Council (SSC) to reduce the number of ‘hard to fill’ tourism vacancies in the resort, to tackle career development issues, and work force skill base shortages during the period 2009 – 2013.**

Rationale:-

As Southport continues its transition into England’s Classic Resort throughout the next 5/10 years, there will be huge focus on establishing the resort’s emerging leisure, cultural, accommodation and retail offers so they are fit for purpose and are able to attract new high spending visitors. In reaching that point, investments made to date must be matched by equal consideration being given to training and skills development that will enable a level of customer service to fulfil, if not exceed customer expectations.

In recognition of this fact, Sefton Council’s Tourism Skills Business Plan has been developed to address the challenge of recruiting, training and retraining a workforce competent to deliver the high standards of service associated with a benchmark Classic Resort. In this regard the plan focuses on capitalising on the potential for increased employment opportunities offered through the concept of classic resort by developing initiatives to ensure local residents/communities are equipped with the skills and knowledge of the tourism industry demanded by businesses operating within the sector. The appointment of a dedicated Employment Liaison Officer (ELO) to champion the tourism skills agenda at local level and facilitate communication between skills providers/stakeholders and the industry has done much to progress these issues.

However, issues still remain. Recent research work that surveyed 30 Southport businesses operating in the tourism sector show that skill levels among Sefton residents and those in the hinterland are at a lower level than is seen nationally; in addition, it would appear that the area’s workforce receives lower levels of training (this prevalent overall – rather than specifically within the tourism sector). From a perceptual point of view, poor pay and working conditions within the industry are still affecting good quality recruitment and retention of staff. As a result, the sector is still seen by many as a ‘job’ rather than a credible career option. This fact, coupled with a general lack of awareness among employers as to the variety of existing and bespoke training courses available to them and their staff, compounds the problem further.

This issue is of crucial importance to the prosperity and sustainability of Southport’s visitor economy. Our ability to provide the standards of service consistent

with the Classic Resort brand will be one of the core measures new and existing visitors will use to judge the quality of their experience. In meeting this challenge the resort's tourism industry must now recognise the importance of skills and training not only in terms of the quality of service delivery, but also in terms of how it will improve the profitability of their business. In taking greater responsibility for its actions, the potential exists to overcome the negative perceptions of the industry that are restricting the calibre of people choosing Southport as a place to work.

Strategic Emphasis	2009/10	2010/11	2011/12	2012/13
<p>In developing the key recommendations of the Tourism Skills Development over the lifetime of this strategy, the following key actions are proposed:-</p>				
<p>1. Overcoming perceptions of the industry.</p> <ul style="list-style-type: none"> • Improve the profile & scope of tourism careers in Southport by raising awareness of the destination's 'Classic Resort' ambition among schools, colleges & recruitment agencies. Interventions may include appointing industry champions, providing careers trips to key attractions/hotels/events/entertainment venues & increased presence at careers fairs etc. • Develop communications strategy (within SIS communications plan) to maximise publicity around industry success stories including new entrants/operators to Southport, business performance and employee development initiatives etc. • In conjunction with Sefton Education Business Partnership, assess promotion of tourism careers in Southport schools & colleges & develop new initiatives with TMP that can be used in the longer term to address poor perceptions of the industry at an early age. • In conjunction with partners support initiatives to develop work experience placements aimed at encouraging young people into the industry. • Raise the profile of Southport and the tourism career opportunities it offers via inclusion in Springboard initiatives (web site etc) - Springboard UK is a young dynamic organisation which promotes careers in hospitality, leisure, tourism and travel to a range of potential recruits and influencers 	X	X	X	X
<p>2. Encouraging skills & training.</p> <ul style="list-style-type: none"> • In conjunction with Sefton@Work & Southport Employment Liaison Officer (ELO) continue 121 dialogue with, and enhance communications to, tourism businesses in Southport aimed at raising awareness of the Learning & Skills Council funded Routeway Initiative, identifying ongoing training needs and signposting to external courses provided by TMP and external training agencies. • Work in conjunction with TMP, external training providers & Sefton@Work/ELO 'package' training & skills offered to employers as a means of providing continuity between training initiatives, facilitate medium term staff career development and to increase the level of transferable skills. • In conjunction with TMP and other skill providers, develop flexible training scheme initiatives to overcome issues around 	X	X	X	X

Strategic Emphasis	2009/10	2010/11	2011/12	2012/13
<p>releasing staff for training during business hours. This will include considering the potential of providing web interface/online training initiatives.</p> <ul style="list-style-type: none"> Establish performance monitoring systems for external training undertaken by business operating within Southport's visitor economy. 				
<p>3. Business Leadership.</p> <ul style="list-style-type: none"> Develop structured programme of seminars and information portals for businesses operating in the visitor economy to share best practice information that relates to staff retention, personal development & work place environment. In conjunction with Sefton@Work, encourage business champions capable of advocating the benefits of the ELO service to others, understand the importance of employee career progression and are willing to act in an ambassadorial capacity for the ongoing development of the skills agenda in Southport. Establish the potential of creating a Skills Development Sub Group that reports to the STBN/Brand Partnership. In conjunction with Sefton@work/ELO target smaller businesses and assess the need for guidance in HR areas such as setting up personal development plans etc. 	X	X	X	X
<p>4. Continue to organise the Southport Ambassador Awards scheme on an annual basis, rewarding employee excellence, recognising and disseminating good employment practice amongst the local tourism industry, and promoting the importance of tourism as a career.</p>	X	X	X	X

5.3.3 Priority 8 – Spreading the benefits of the visitor economy

Intention:

- **To develop community ownership, responsibility for and participation within Southport’s Visitor Economy**

Rationale:-

In supporting Southport’s transition into England’s Classic Resort, the resort’s heritage, retail, conference and leisure offers will play a huge part in attracting the diverse range of visitors required to sustain the visitor economy and stimulate investment opportunities. Whilst these products will define what Southport is and what visitors perceive Southport to be, those who live and work in the resort will play an equally important role in bringing the destination to life and developing its distinctive sense of place. As a result, the visitor economy must be developed so that it is relevant to and reflects the needs of its community and encourages their participation within it.

Recent survey work indicates that perceptions among our local communities of anti social behaviour, crime and safety in Southport are having a negative impact on people’s wellbeing and constraining their ability to enjoy the variety of experiences the town has to offer. In redressing this imbalance, tourism policy must continue to integrate with other social regeneration initiatives and remove these barriers (actual & perceived) so that communities take pride in Southport and contribute toward its development as a vibrant, dynamic and exciting destination. In achieving this balance, the potential exists to truly distinguish the destination from its competitors by creating an environment where sustainable and cohesive communities are an integral part of the product offer rather than simply co existing with it.

Through out 2007 & 2008, the Tourism Department has been proactive in using the opportunities associated with the visitor economy to improve the lives of our communities and consequently the quality of visitor experienced offered. The recruitment of 150 volunteers to work on the events programme for example now supports the Southport visitor welcome programme as well as helping volunteers enhance their career and social skills. Similarly, the Tourism Routeway programme run in conjunction with [Sefton@work](#) is creating employment and training opportunities for local people to work in the visitor economy, and the emergence of the resort’s cultural offer is enabling interaction with the Southport’s artistic & creative communities. From January to June 2009, 24 people have been recruited through the Tourism Routeway programme, including businesses like Prego Restaurant and the Weatherspoon. In addition to this 16 businesses have been assisted with recruitment of staff with more than 60 people being recruited.

Given these successes, and the clear relationship between a successful destination and the extent to which people want to live and work within it, this strategy

will seek to develop the foundations from which this model can be extended to embrace a much broader cross section of Southport's visitor economy. This will involve closer working with the voluntary & community sectors including Sefton CVS and the Southport Community Safety Area Partnership to help overcome problems relating to antisocial behaviour, crime and wide ranging environmental issues. It will also involve targeting communications to encourage greater community participation in leisure & recreational tourism as well as supporting opportunities for social and local business enterprise.

Strategic Emphasis	2009/10	2010/11	2011/12	2012/13
1. Tourism Routeway Programme – In conjunction Sefton@work , continue to employ Employment Liaison Officer and work with Job Centre Plus, Southport College et.al. as a means of creating training and employment opportunities for local residents in the tourism & hospitality industry.	X	X	X	X
2. Encouraging Participation within the Visitor Economy <ul style="list-style-type: none"> • Volunteer Programme – In conjunction with Sefton CVS expand the exiting tourism volunteer programme to enhance community volunteer opportunities in the hospitality, leisure and cultural sectors. Key aims will include structuring volunteer activity to support those outputs associated with the Child Poverty Pilot Programme, providing opportunities for young people and developing bespoke volunteer initiatives as part of the Phase 2 Kings Gardens HLF programme (pending programme approval). • Developing Cultural opportunities <ul style="list-style-type: none"> ➤ Reconstitute monthly community 'jazz jam' sessions in conjunction with the Southport International Jazz Festival. ➤ Develop community engagement programmes for all ages as part of the Southport Comedy Week (in conjunction with Comedy Trust). ➤ Encourage community participation within Southport main events programme – Air Show, Musical Fireworks etc ➤ Encourage and provide support for community led events & activity within Southport's public open spaces. ➤ Support community based activities associated with Southport Cycle Town initiative. 		X	X	X
3. Encouraging Enterprise within the Visitor Economy – Through integrated working with Sefton Council's Regeneration Department and those priorities set out in section 6, align grants support and advise packages through Sefton Integrated Business Service (SIBS) to create incentives for local and social enterprise within Southport's tourism sector.		X	X	X
4. Community Safety & the Environment – Based on priorities set out above and those of the Southport Community Safety Area Partnership, develop action plans with Sefton Council's Community Safety Unit to develop safer and stronger communities within Southport. Key issues to be covered during the lifetime of this strategy are as follows:- <ul style="list-style-type: none"> ➤ Where practical, align tourism marketing activity with Sefton community segmentation analysis (conducted by ACORN) to increase numbers of local residents benefiting from the Visitor Economy - major events programme, cultural activity, retail offer etc. 		X	X	X

Strategic Emphasis	2009/10	2010/11	2011/12	2012/13
<ul style="list-style-type: none"> ➤ Develop structured framework for the targeted use of the Community Payback Programme to tackle gaps in existing service provision including cleansing, graffiti & maintaining the resort's tourism infrastructure etc. ➤ Develop detailed action plan for Phase 2 Kings Gardens HLF scheme (pending approval) to tackle existing and perceived problems relating to young people, anti social behaviour, under age drinking and crime. ➤ In conjunction with the existing night time economy group, develop initiatives for enhancing Southport's evening economy as set out in section 6. 				
<p>5. Communications - In conjunction with partners, establish communication plans for the Southport Cycle Town Project, Sefton's Natural Coast Landscape Partnership Programme & Southport Investment Strategy to increase community input, understanding and participation within each of these initiatives.</p>		X	X	X

Agenda Item 4

6.0 Resource Allocation: People and Partnerships

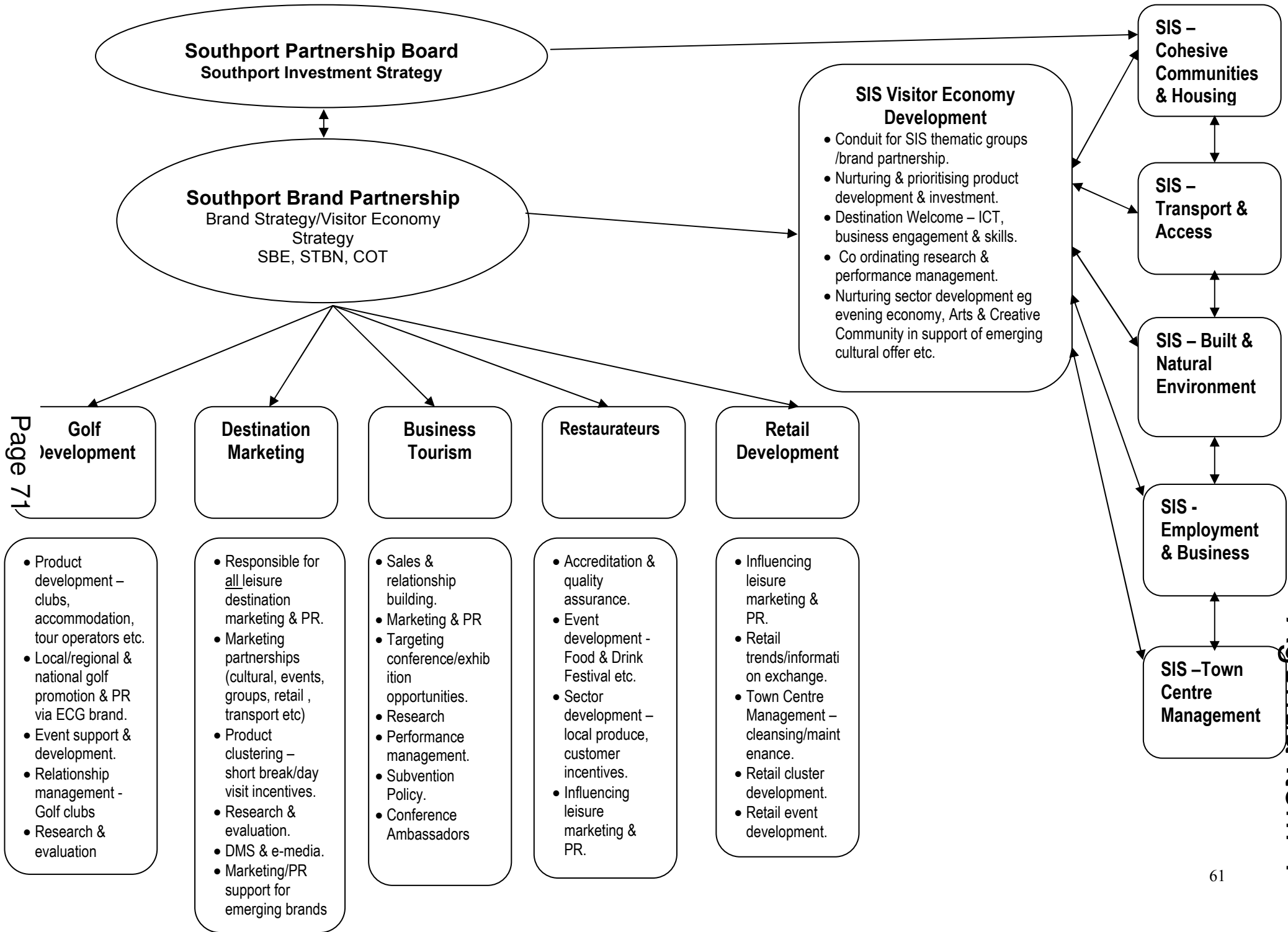
6.1 Creating a Brand Partnership

The recommendations of the Southport Brand Strategy and the Business Tourism Business Plan provide clear guidance around how Southport's visitor economy must evolve to appeal to the kinds of people that will sustain the resort's visitor economy in the long term. In establishing the England's Classic Resort brand, all stakeholders must understand that this journey will relate as much to developing the right marketing & PR strategy as it will to providing good customer service and creating market led products. Whilst combining these elements efficiently will allow Southport to genuinely deliver outstanding tourism experiences, without the appropriate structures in place to provide all stakeholders with the opportunity to understand and influence this transition, success will be limited.

The existing STBN model has moved huge progress in overseeing the marketing of Southport's visitor economy over the last 10 years, however, the time is now right for it to have greater influence over the collection of functions associated with developing the Classic Resort brand. In achieving this, the STBN must become the lead organisation for the visitor economy in Southport and become effective in engaging the wide range of stakeholders that are responsible for the destination's promotion and development at all levels – strategic planners, transport operators, town centre management, attractions operators etc. Engaging these interests through the creation of an overarching Destination Brand Partnership that is linked to the implementation of the resort's new brand strategy seems the most appropriate and functional option to pursue.

The principle of creating a brand partnership is centred on developing a structure that is representative of all the resort's key stakeholders and is capable of delivering the wide ranging priorities detailed within this strategy. This approach is intended to make the partnership relevant to the commercial objectives of those operating within Southport's visitor economy so that it is better placed to reflect their needs, and can respond quickly and effectively to market change. In operational terms, the partnership will underpin the management of the visitor economy in Southport by ensuring the delivery of England's Classic Resort brand is focused and true to the principles contained within the brand strategy, it will support initiatives to attract investment for development of new product, and provide effective mechanisms for monitoring and evaluating the impact of the strategy. In short, this will mean rationalising & streamlining the array of groups that currently influence the marketing, sales and product development within the resort's visitor economy, into a balanced & integrated partnership that shares a common vision, goals and objectives.

Given the detailed strategic guidance we now have in place and the priorities for development contained within this strategy, the following structure sets out how Southport's Brand Partnership will operate.



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The proposed structure effectively streamlines activity associated with implementing each development area into focussed delivery groups that will avoid duplicating the efforts of the partnership and ensure available resources are targeted appropriately and allocated efficiently.

In contrast to the existing STBN 'sub group' approach, this proposal allocates responsibility for all leisure destination marketing activity under one function. Consuming the work of the existing group travel sub group, the work of the destination marketing function will include responsibility for looking across the other delivery groups and targeting marketing campaigns on their behalf as and when required. It will also focus on developing marketing partnerships with key product sectors comprising the resort's visitor economy particularly the accommodation offer, emerging cultural offer and in supporting the retail offer. Furthermore, the group will also support the tactical marketing of the resort's events programme, define research priorities, supporting emerging brands such as the night time economy and work with stakeholders/operators to 'package' the leisure opportunities in support of short break and day visitor marketing campaigns.

Rationalising leisure destination marketing activity in this way will allow the remaining delivery groups to focus specifically on the strategic development of their individual product areas in line with the standards associated with the Classic Resort brand. This will include addressing quality and service standards, encouraging greater representation/co operation from other private sector stakeholders and developing new initiatives that will help diversify the product offer and attract new visitors – developing thematic events for example.

In terms of business tourism, the delivery group will focus on implementing the key actions contained within Blue Sail's business plan aimed at reaching new markets whilst protecting existing business. Core functions of the group will include addressing quality issues with accommodation providers, developing a collective responsibility for targeting and selling to key conference buyers and working in conjunction with Liverpool's conference bureau to structure sales, PR and marketing activity. Importantly, the group will also need to consider the improvements required of the resort's leisure product in order to enhance the attractiveness of the conference offer to key buyers – public realm, retail, evening economy etc.

The biggest challenge facing the brand partnership, and indeed the development of Southport's visitor economy as a whole will be its ability to link the sales & marketing activity with the co-ordinated and prioritised development of Southport physical offer and infrastructure. In addressing this issue, the new Visitor Economy Group will provide the conduit between the Southport Investment Strategy's thematic groups delivering regeneration activity and the brand partnership. Focussing specifically on investment and nurturing new product to enhance Southport's visitor offer (see DA2), the group will focus on guiding the work of the SIS thematic groups so that regeneration activity and initiatives reflect the needs of the visitor economy. This approach will allow the 'know-how' and commercial expertise of stakeholders to be factored into product development decisions as well as ensuring the mechanisms are in place for them to engage and influence this process. The visitor economy group will also take on responsibility for destination welcome, research and skills initiatives to a significantly higher level of detail than has been experienced before.

The brand partnership itself will essentially replace the STBN Alliance and through its extended remit, work to encourage new stakeholders to become members and champions of the partnership. Meeting on a quarterly basis, the partnership will be responsible for monitoring the performance of the delivery groups, addressing performance issues and developing strategy

based on the priorities contained within the Visitor Economy Strategy. Importantly, the partnership will be committed to implementing the Classic Resort brand as has been detailed within the brand strategy. Its members will act an ambassadorial role to encourage support for the Southport's chosen direction and in recruiting new playing into the partnership.

The proposed structure also formalises the links between the brand partnership and existing Southport Partnership Board to raise the profile and importance of the visitor economy in the wider regeneration agenda associated with the Southport Investment Strategy. The approach will also provide access to key decision makers and other partnerships such as Sefton's Chamber of Commerce.

6.2 Next Steps

1. Develop detailed proposal for governance of the brand partnership & consult with STBN.
2. Target a cross section of public, private & community stakeholders to form the brand partnership.
3. Recruit a brand champion capable of chairing the partnership meetings, recruiting partners from key stakeholders, leading initiatives & helping secure investment.
4. Develop brand partnership constitution & agree priorities with Southport's Brand Strategy.
5. Develop communications strategy targeting stakeholders and wider communities to raise the profile of England's Classic Resort and its relevance to the economic and social wellbeing of those living, working & investing in the report.

6.3 Key Funding Streams

NWDA, ERDF/Partners for growth funding and private sector contributions, will be synthesised with Sefton Council's annual budget setting process to provide a robust cost framework for the years ahead. Expenditure and activity plans will be detailed within core business plans that will/have been developed to implement priority areas 1-4 & 6 outlined above. The remaining action areas will be funded through budgets falling outside the direct control of the Southport Brand Partnership/SMBC Tourism Department and through securing additional external funding that will be developed during the lifetime of this strategy.

Supporting Merseyside's reclassification into an Objective 2 area, transitional funding has been awarded to the Liverpool City Region via the Northwest Operational Programme (EU Action Area 3.3) for the period July 09 to June 2012. This funding has been allocated to help sustain investments made through the preceding Objective 1 programme as a means of sustaining economic growth and creating jobs. Given the size and increasing importance of the Visitor Economy to the long term prosperity of the Liverpool City Region, Southport has secured ERDF resources under the Partners for Growth initiative (see section 4.4) amounting to £870,714 allocated over three years commencing 1st July 2009 to 30th June 2012. It has also been awarded £80K from the NWDA's Business Tourism Development fund for the period August 2009 to July 2011.

These funding allocations will be matched by Sefton Council's core tourism budget and contributions from the STBN. The table below set out how will be allocated between priority areas 1-4 & 6 during the lifetime of this strategy.

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Partners for Growth Activity Themes	Year 1 (£) July 09 – Dec 09			Year 2 (£) Jan 10 – Dec 10			Year 3 (£) Jan 11 – Dec 11			Year 4 (£) Jan 12 – June 12		
	ERDF	SMBC	STBN	ERDF	SMBC	STBN	ERDF	SMBC	STBN	ERDF	SMBC	STBN
Destination Marketing <i>Visitor Economy Strategy Priority Areas 1 & 2</i>	87474	62474	25000	174570	124569	50000	174759	124759	50000	87473	62473	25000
Event Development <i>Visitor Economy Strategy Priority Area 3</i>	0	0	0	80000	80000	0	50000	50000	0	20000	20000	0
Event Marketing <i>Visitor Economy Strategy Priority Areas 2 & 3</i>	20604	20604	0	30000	30000	0	30000	30000	0	10000	10000	0
*Research <i>Visitor Economy Strategy Priority Area 6</i>	0	0	0	16149	16149	0	21954	21954	0	0	0	0
Destination Development <i>Visitor Economy Strategy Priority Area 4 (ICT Element)</i>	0	0	0	16149	16149	0	16149	19149	0	0	0	0

* Supplemented with additional destination research co-ordinated through TMP project monitoring & evaluation programme.

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7.0 HOW DO WE KNOW THAT WE HAVE ARRIVED?

7.1 Performance Management

The collation of performance management information will be undertaken by the Tourism Department (see Priority 6). Through the creation of an agreed set of Key Performance Indicators (KPI's) data sets will be used to monitor and evaluate the performance of those sectors comprising Southport's visitor economy (see below). KPI information will be published on a monthly basis (where feasible) and made available to all members of the Southport Brand Partnership, Sefton Council and other partner organisations such as TMP and Sefton's Chamber of Commerce.

As per the department's existing data management plan, performance management data gathered by the Tourism Department will also be used to inform annual local, regional and national research & performance management initiatives including:-

- TMP – Visitor Economy volume & value estimates for Liverpool City Region
- TMP – Partners for Growth monitoring & performance management.
- Destination Performance UK – Coastal Destination Benchmarking Analysis.
- Sefton Council – SPRINT & contribution to local/regional/national performance indicators.
- Locally agreed business performance targets – including environmental & employment measures?
- National Quality Measures
- Others?

7.2 Visitor Economy - Key Performance Indicators

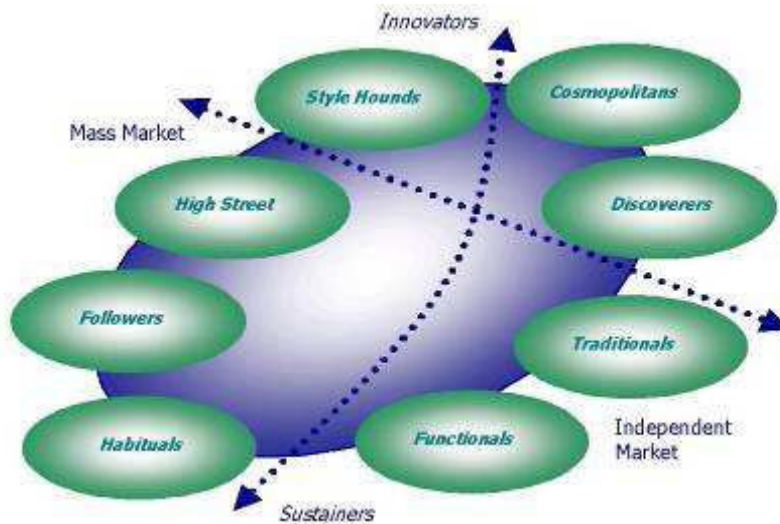
KPI	Indicator Data Source	Monthly / Annually
Satisfaction Indicators <ul style="list-style-type: none"> ➤ % Visitors rating overall experience good/excellent. ➤ % of customers considering TIC experience good/excellent. ➤ % of users who consider destination web site good or excellent 	Destination Benchmarking/Events Research Surveys. Destination Benchmarking Surveys Online Surveys	Annual Annual Annual
Economic Indicators <ul style="list-style-type: none"> ➤ Number of day visitors/trips (+ % increase/decrease). ➤ Number of overnight stays/trips (+% increase/decrease). ➤ Value of day visitor spend (+% increase/decrease). ➤ Value of staying visitor spend (+% increase/decrease). ➤ Value of day visitor spend per head (+% increase/decrease). ➤ Value of staying visitor spend per head (+% increase/decrease). ➤ Net Local Authority spend on tourism per head of population. ➤ Number of accommodation bookings made through MERVIN ➤ Value of accommodation bookings made through MERVIN ➤ Return on investment for marketing campaigns (as a ratio) ➤ Annual average bed space & bedroom occupancy of accommodation. ➤ Number of FTE tourism related jobs ➤ Number of placements on Tourism Routeway Programme 	Attractions, Hotel Occupancy, Town Centre Footfall & Resort Parking data used to inform STEAM/Arkenford Volume & Value Estimates MERVIN MERVIN Event/Marketing Spend as a ratio of total annual visitor expenditure Monthly hotel occupancy surveys STEAM Estimates Sefton@work KPI's	Annual Annual Annual Annual Annual Annual Month Month Annual Month Annual Annual

KPI	Indicator Data Source	Monthly / Annually
<p>Sustainability Indicators</p> <ul style="list-style-type: none"> ➤ % of residents indicating they are satisfied with the local impact of tourism. ➤ Ratio of annual visitors per head of population. ➤ % of visitors arriving by train, coach or bus for major events programme. ➤ % of visitor economy enterprises (accommodation, attractions, activities) with a recognised environmental certification. ➤ % of visitor economy enterprises (accommodation, attractions, activities) participating in green tourism accreditation schemes ➤ % of visitor economy enterprises (accommodation, attractions, activities) participating in quality accreditation schemes. ➤ FTE visitor economy related jobs as a percentage of total FTE jobs 	<p>SMBC/Southport ACORN Analysis. STEAM/ACORN Analysis Merseytravel/Coach Operators. TMP/SMBC</p> <p>TMP Green Tourism Business Scheme TMP advocated schemes</p> <p>TMP Green Tourism Business Scheme TMP advocated schemes</p> <p>SMBC/Southport Brand Partnership Quality in Tourism (VB)/ The AA STEAM/SMBC Planning & Economic Regeneration</p>	<p>Annual Annual Month</p> <p>Annual</p> <p>Annual</p> <p>Annual Annual</p>
<p>Organisational Indicators</p> <ul style="list-style-type: none"> ➤ Number of new/ existing Brand Partnership/STBN members, year on year 	<p>Tourism Marketing</p>	<p>Month</p>
<p>Marketing Communications Indicators.</p> <ul style="list-style-type: none"> ➤ Number of unique users to www.visitsouthport.com ➤ Response rates/conversions to direct marketing campaigns (event ticket sales, golf tee times booked etc). ➤ Response rates/conversions to e-marketing marketing campaigns (event ticket sales, golf tee times booked etc). ➤ Trade package offers/opportunities created through brand partnership ➤ E-marketing activity undertaken as a ratio of printed marketing activity. ➤ Amount of air time/ column square inches of media coverage. 	<p>All data to be provided by SMBC Tourism Department.</p>	<p>Month Month</p> <p>Month</p> <p>Month Month Month</p>

KPI	Indicator Data Source	Monthly / Annually
<p>Business Tourism Indicators</p> <ul style="list-style-type: none"> ➤ Conference bookings confirmed through Southport Conference Bureau ➤ Conference bookings confirmed through TMP Conference Bureau ➤ Number of unique users to www.southportconferences.com ➤ Number of familiarisation visits undertaken ➤ Number of live enquiries. 	<p>All data to be provided by SMBC Tourism Department.</p>	<p>Month Month Month Month</p>
<p>Headline Product Development Indicators (creating baseline in year 1)</p> <ul style="list-style-type: none"> ➤ Capital Investment Funding Secured ➤ Volume of vacant retail floor space ➤ Visitor economy enterprise supported through business grants & advice. ➤ Cultural Enterprise supported through business grants & advice. ➤ Retail footfall benchmarked against comparable destinations ➤ Retail development enquiries made ➤ Retail development enquiries converted 	<p>All data to be provided through Southport Partnership/Southport Investment Strategy Implementation Group.</p>	<p>Quarter Quarter Quarter Quarter Month Month Month</p>

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Appendix A: The Ark Leisure Model



MAIN SEGMENTS IN THE ARKLEISURE SYSTEM			
STYLE HOUNDS	HIGH STREET	FOLLOWERS	HABITUALS
'Young Free Single', impulsive Fashion counts Brand counts Looking for fun with friends Most not seriously sporty	Main stream early adopters Followers of high street fashion Care what others think Happy to buy packaged options	Strongly influenced by what others will think Don't want to be seen as old fashioned Less active Slow to adopt Avoid risk	Largely inactive, low spending group Very traditional, strongly resistant to change Risk adverse Value relaxation, peace and quiet
COSMOPOLITANS	DISCOVERERS	TRADITIONALS	FUNCTIONALS
Strong, active, confident Style & brand important, but as an expression of their self made identity. High spenders especially on innovation and technology Looking for new challenges, new experiences, Globetrotters	Independent in mind and action Little influenced by style or brand but interested in new options Buy on function and value to them Looking for new and educational experiences	Self reliant internally referenced Slow to adopt new options Strong orientation towards traditional values Value individual attention & service	Self reliant Price driven Value function over style Traditional values, but interested in new experiences, not risk adverse

Source: Arkenford Research

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REPORT TO: CABINET MEMBER -TECHNICAL SERVICES
CABINET MEMBER -ENVIRONMENTAL
CABINET MEMBER -REGENERATION

DATE: 16 DECEMBER 2009

SUBJECT: ENERGY CARBON AND WATER
PROGRESS REPORT

WARDS AFFECTED: All

REPORT OF: Mike McSorley
Head of Regeneration and Technical Services

CONTACT OFFICER: Ian Weller
Energy Manager - Technical Services
ian.weller@technical.sefton.gov.uk
Tel: 0151 934 4221

EXEMPT/CONFIDENTIAL: No

PURPOSE/SUMMARY:

The purpose of this report is to update and advise members of the corporate, domestic energy efficiency, eco education, strategic progress and awareness activities undertaken in accordance with the Councils Corporate, Carbon Reduction, Fuel Poverty, Sustainable Schools and Home Energy Conservation Act commitments during 2008/09.

REASON WHY DECISION REQUIRED:

No decision required - advice report.

RECOMMENDATION(S):

- (i) That Cabinet Members note this report for information
- (ii) Members congratulate the various external cross sector partners in delivery of activities in this report.

KEY DECISION: No

FORWARD PLAN: Not appropriate.

IMPLEMENTATION DATE:

ALTERNATIVE OPTIONS:

IMPLICATIONS:

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Budget/Policy Framework:

FINANCIAL: There are no financial implications as a direct result of this report.

	2009/10 £	2010/11 £	2011/12 £	2012/13 £
<u>CAPITAL EXPENDITURE</u>				
Gross Increase in Capital Expenditure				
Funded by:				
Sefton Capital Resources				
Specific Capital Resources				
<u>REVENUE IMPLICATIONS</u>				
Gross Increase in Revenue Expenditure				
Funded by:				
Sefton Funded Resources				
Funded from External Resources				
Does the External Funding have an expiry date?				
How will the service be funded post expiry?				

Legal:

Risk Assessment: Failure to meet Carbon Reduction Commitment, HECA, Affordable Warmth, LAA Stretch Target, NI 185, NI186, NI 187, NI 188, CAA and Use of Resources, Corporate Plan Community Strategy, EU Directive, UK/EU Carbon Savings targets

Asset Management: There are no direct implications arising from this report.

CONSULTATION UNDERTAKEN/VIEWS

FINANCE – FD259 – The Finance and Information Services Director has been consulted and his comments have been incorporated into this report

CORPORATE OBJECTIVE MONITORING:

<u>Corporate Objective</u>		<u>Positive Impact</u>	<u>Neutral Impact</u>	<u>Negative Impact</u>
1	Creating a Learning Community	✓		
2	Creating Safe Communities		✓	
3	Jobs and Prosperity	✓		

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4	Improving Health and Well-Being	✓		
5	Environmental Sustainability	✓		
6	Creating Inclusive Communities	✓		
7	Improving the Quality of Council Services and Strengthening local Democracy	✓		
8	Children and Young People	✓		

LIST OF BACKGROUND PAPERS RELIED UPON IN THE PREPARATION OF THIS REPORT

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INTRODUCTION

This information report provides members with a overview of progress broken down into three principle areas of:

1. Domestic Energy and Fuel Poverty
2. Corporate Energy
3. Eco Education

The report covers the outcomes key achievements and progress within the 2008/09 financial year. Due to the extent/number of operational services and strategic interventions under the responsibility of the Energy Team, the report has presented information only for a cross section of work, in doing so gives a more concise summary of progress.

In parallel to this, we are awaiting the final outcomes of the Energy Review requested by Full Council in September 2008 and approved through Cabinet on 11 December 2008. This objective review is due to be fed back from the appointed consultants, and by reporting to members in February 2010 will provide a very detailed review and provide proposals on future strategic direction and operational delivery for the Council.

1.0 PART ONE - DOMESTIC ENERGY AND FUEL POVERTY

- 1.0.1 The Home Energy Conservation Act 1995 (HECA) required that local authorities draw up an action plan to reduce the amount of energy used in domestic buildings by 30% in the next 10 to 15 years (across all tenures). In accordance with this Act, the Council prepared its Home Energy Conservation Strategy. The purpose of the Strategy was for the Council to set out the energy conservation measures that it considered practicable, cost effective and likely to result in meeting the set target improvements in the energy efficiency for all sectors of residential accommodation throughout Sefton.
- 1.0.2 The historical performance of Sefton MBC for 2007/8 showed that Sefton should have achieved a 24% improvement in efficiency of its stock, in order to reach its 30% target by 2010. By that time Sefton MBC had achieved 21.09%.
- 1.0.3 The shortfall is down to the period before the establishment of the energy team in 2001. Since the establishment of the Energy Team the Council has consistently recorded a greater than requisite 2% improvement.

1.1 2008/09 HECA PROGRESS

- 1.1.1 Due to a review of the HECA legislation started by DEFRA (Department of the Environment Food and Rural Affairs) in 2008, there has been a hiatus in the call for reports, as the Government considers a proposal for reshaping or repealing the Act. This has been further compounded by the establishment of the new Government Department for Energy and Climate Change (DECC) which the Act has been passed to create. Reviewing the Act for the new department has not been seen as a priority. Therefore this year we have not received a call for data gathering, however we have considered it prudent to undertake a minimal data collection exercise. This is to at least monitor our own progress and be prepared for any future monitoring required by the Secretary of State.

1.1.2 This year's data (for activities undertaken between April 2008 and March 2009) shows a 3.77% improvement on last year, which is a continuing increase in performance towards the Council's total HECA target. The Council has a cumulative progress of 24.07% towards its 30% target, although its programme suggests it should have reached 26%. Due to continuing improvement year on year we are confident that if investment levels are maintained, a 3% per annum improvement can be achieved over the next 2 years to reach the government target for 2010/11.

1.1.3 Furthermore, these figures should be considered pessimistic as not all data is included. This is because the level of collection and pressure applied to external agencies is reduced, as this would probably require legal actions since many have chosen not to supply data this year as they know that there is a hiatus in the report call.

1.2 PROGRAMME DELIVERY 2008/09

1.2.1 To deliver the broad HECA programme a number of key projects are undertaken, below is a brief overview of each key project that has been undertaken. Some of the results have already been reported elsewhere but are included for completeness here.

1.3 SEARCH (SEFTON ENERGY ACTION REACHING COLD HOMES)

1.3.1 Sefton Council with the support of NHS Sefton has been awarded mainstream funding to continue its SEARCH programme funded until 2011, worth approximately £162,000.

1.3.2 SEARCH is a home insulation grant referral scheme to fill the gaps of national grant provision. During 2008/09 SEARCH issued 207 grants to households for loft and cavity wall insulation in homes where a member of the household suffers from a cold related illness.

1.4 WARM FRONT GRANTS

1.4.1 A national government grant scheme to tackle fuel poverty in England providing a package of heating and insulation measures up to £3,500 available to homeowners and private tenants in receipt of certain benefits/allowances.

1.4.2 During the 2008/09 financial year, 2,921 households received a Warm Front grant for heating and energy efficiency measures at a total cost of £3,582,129

1.5 HEALTH THROUGH WARMTH

1.5.1 This scheme was recently extended until 2011 and 37 households received assistance through this crisis fund to provide heating measures, which are not available from national grants in their homes during 2008/09.

1.6 HELP (Home Energy Loans Project)

1.6.1 This project offers interest free loans of up to £1,000 for homeowners to install energy efficiency measures in their homes (subject to acceptance).

1.7 SEFTON FUEL POVERTY OUTREACH SERVICE

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- 1.7.1 With funding from Supporting People, commenced in May 2008 with one Affordable Warmth Worker it provides acute demand for outreach and advocacy support. The scheme enables hard to reach residents to be supported in accessing grants and other support to reduce their risks of suffering from fuel poverty.
- 1.7.2 The main function of the role of Affordable Warmth Worker is to provide a home visiting service to assist people to apply for heating and insulation grants to make their homes warmer and healthier.
- 1.7.3 During home visits the Affordable Warmth Worker frequently identify additional housing and social needs and signpost them accordingly to a wide range of partners. This aspect of the role has worked extremely well helping to enhance the service provided and ultimately assisting the clients to remain living independently in their homes, with physical and fiscal support. After exceeding targets in YR1 by directly assisting 440 vulnerable residents the service was expanded to add a second Support Worker in April 2009 due to demand for service and increasing risks of fuel poverty that exist.

1.8 SOUTHPORT HOUSEWARMERS

- 1.8.1 In 2007 DEFRA (the department of the Environment Food and Rural Affairs) ran the Community Energy Efficiency Fund (CEEF) a £6.9 million programme across England to promote the take up of grant schemes for energy efficiency and fuel poverty improvements. As part of that programme Sefton was able to submit a joint bid with Wirral Council to run a scheme in some of the most vulnerable areas. Wirral led the bid and was the accountable body, securing £36,000 from DEFRA.
- 1.8.2 As part of the scheme nearly 3,000 homes in Sefton were targeted in the L21 area. The homes were part of a door-to-door campaign, which were enhanced with a community event. The campaign began with a mailout to each home, followed very soon after by a CEEF funded Community Advisor knocking on the door. If the householder was out, a postcard detailing the local event and giving a freephone number for energy efficiency advice was given. Some homes were re-visited if the residents were out on the first call. The event in Sefton, which joined in with a Community action group Fun Day, had over 60 householders visit the Community Advisors.
- 1.8.3 Given the financial climate and rising fuel costs the energy team at the Council were approached to see if ward area funding could be used to help residents reduce their energy bills. With the benefit of the Community Energy Efficiency Fund programme already undertaken it was proposed that a similar programme be administered in the Birkdale ward.
- 1.8.4 The scheme was extended to Kew, Cambridge, Norwood and a further area of Birkdale by the end of the programme. The total cost to the ward budgets was £3,221 and we estimated a total leverage of investment of circa £96,952 was achieved. We also distributed in excess of 700 low energy light bulbs to households in those areas. The premise was that local Councillors apply their knowledge to direct energy advisors to those streets with a higher proportion of vulnerable groups least able to afford the rising fuel costs.
- 1.8.5 This produced some very successful results, the table below shows the outputs from the schemes and relative investment in each area. Abbreviations used;
 - ◆ **Mailed**- Number of properties that had a letter sent to them and subsequently called at for a Face to face interview.

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- ◆ **Face to face** – Interview with households to determine best form of assistance. Investment based on low energy lightbulbs given.
- ◆ **Survey** – Short series of questions to pinpoint areas of most interest
- ◆ **HECs**- Expanded and detailed survey on households energy issues leading to a tailored report and indicative Energy Performance certificate.
- ◆ **LI** – Households referred for loft insulation.
- ◆ **CWI** - Households referred for cavity wall insulation.
- ◆ **WBC** – Households referred for welfare benefits check.
- ◆ **CFS** - Households referred to community fire service for safety check and smoke alarm fitting.
- ◆ **WF**- Households referred to the Warm front scheme, a grant offering up to £2,700 worth of heating and insulation work for those on certain benefits.

	Birkdale	Kew	Event	Totals	Cambridge	Norwood	Event	Totals	Birkdale (additional)	Totals	Investment expected
Mailed	827	619	0	1,446	268	641	0	909	866	3,221	N/A
Face to face	110	61	46	217	155	189	11	355	201	773	£1,546
Survey	69	43	47	159	66	64	11	141	38	338	£5,746
HECs	8	3	2	13	0	1	2	3		16	£544
LI	19	17	14	50	14	36	6	56	13	119	£23,800
CWI	16	13	15	44	13	28	3	44	17	105	£31,500
WBC	8	7	1	16	2	5	0	7	0	23	£2,070
CFS	6	9	3	18	5	3	0	8	3	29	N/A
WF	7	11	12	30	2	5	0	7	0	37	£31,746.
											£96,952

1.9 SOLAR SEFTON INNOVATION PROGRAMME

1.9.1 As part of the Local Area Agreement Stretch target programme a pilot scheme to tackle properties that are hard to treat (ie properties that are older solid wall construction and have limited opportunities for energy improvement) was established. The technical solution employed was based on retrofitting solar water heating technology (the preheating of domestic hot water by daylight). Terraced properties were targeted in the Housing Market Renewal area and the project delivered solar water units at a target price of £3,000. It is estimated that these will provide 40-50% of the properties hot water needs and save them circa £80-£150 per annum in fuel costs.

1.9.2 The scheme offered residents the systems for £200 with additional funding from a variety of sources (where other technical barriers existed, such as combi boilers, additional costs were shared between the scheme and residents). We had 73 expressions of interest with 46 properties proceeding to an initial application. Each household was assessed for its technical (i.e. existing hot water system set-up) and carbon saving (i.e. number of occupants in property) suitability. This was completed issuing a short questionnaire. This gave us a list of properties for a full technical survey by priority scoring.

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- 1.9.3 Results from the scheme highlighted that technical complications were less than expected but we had identified other issues (such as contractor capacity). We learnt a lot about a potential CESP or ERDF schemes see section 1.40.

1.10 EASIER BREATHING

1.10.1 As part of the work on SEARCH a pilot programme was identified that improved indoor air quality and sought to improve the quality of life for children suffering from asthma. There is growing evidence that house dust mites can cause trigger asthma symptoms. It is not clear what proportion of asthma in Britain is partly or wholly attributable to dust mites. However even if the proportion is small (eg 5% extra cases), it could represent a substantial burden of disease, because asthma is one of the most common chronic diseases.

1.10.2 The aim of this project is to provide an improved indoor environment for the sufferers and families of asthmatic children living in Neighbourhood Renewal (NRF) areas by providing adaptations to the homes in order to reduce conditions that encourage house dust mite populations. The project funded the installation of measures that reduced humidity levels and raised internal temperatures to control and eradicate some asthma triggers such as house dust mite allergens.

1.10.3 Due to NHS governance and data protection issues, it was not possible (within the one-year timeframe of the project) for health professionals to refer eligible families direct to the project lead. In order to recruit suitable families, 3 local GP's agreed to search their patient records to identify potential families for assistance. A letter was sent to the target patients containing details of the pilot scheme requesting that if they wished to become involved to make contact with the project lead. This resulted in 13 families joining the pilot scheme with a total of 16 asthmatic children.

1.10.4 Each household received a package of energy efficiency and ventilation measures together with a specialist steam clean, new bedding and good practice advice.

1.10.5 From a medical/pharmaceutical perspective, the interventions demonstrated very positive self reported results:

- ◆ 40% reduction in blue inhaler use
- ◆ 92% drop in unplanned attendance at A&E/Walk in centres

Furthermore, from a sleep basis, improvements were also significant:

- ◆ 59% reduction in night time coughing
- ◆ 53% reduction in sleep disturbance
- ◆ 60% reduction in school absences

1.10.6 Following this successful pilot the NHS Sefton agreed to fund this through a Service Level Agreement for the next 3 years starting in 2008/09. Due to limited funds no new marketing was undertaken especially as a report from the pilot was published in order to spread the learning. From this word of mouth the schemes secured 7 families for the second year and is expected to over subscribe for 2009/10 (over 16 families).

1.11 ENERGY AND WARM HOMES ADVICE

- 1.11.1 The Energy Team work in partnership with the Energy Savings Trust Advice Centre to provide a referral scheme with a local focus for our residents.
- 1.11.2 The free phone advice line is open Monday to Friday from 9am to 5pm and trained advisors provide free, impartial advice on a wide range of home heating and insulation grants, schemes and offers as well as general energy efficiency advice. Either face to face, over the phone or through tailored reports 9,761 households received advice through this service last financial year.

1.12 HOUSE WARMER REFERRAL NETWORK

- 1.12.1 In order to strengthen and increase the referral network, the Affordable Warmth Co-ordinator has developed an ongoing programme of fuel poverty briefing sessions to front line staff across many partner organisations.
- 1.12.2 These sessions are delivered during existing team meetings to make best use of their available time. Background information on fuel poverty and issues faced in Sefton, together with a summary of the help available to make homes warmer are discussed and staff are fully briefed on how to refer those who need assistance using a range of referral methods including accessing the free phone advice line, email, fax or completing a House Warmer reply paid post card.

1.20 FUEL POVERTY

- 1.20.1 Fuel poverty is defined as the inability to provide sufficient heat and light for a home without spending a disproportionate level of income in doing so. It is broadly accepted that a fuel poor household is one that needs to spend more than 10 per cent of household income to achieve satisfactory heating levels.
- 1.20.2 Lack of sufficient income combined with thermally inefficient properties means certain households cannot afford to heat their homes to an adequate, safe and comfortable healthy level i.e. 'Affordable Warmth'. Furthermore, the same lack of income also prevents those households from undertaking the necessary cost-effective improvements to the energy efficiency of their properties to alleviate the problem.
- 1.20.3 Fuel poverty is an urgent issue because cold homes can kill, harm people's health or damage quality of life. These effects can also impose wider costs on the community. Medical conditions and illnesses such as influenza, heart disease, and strokes are all exacerbated by the cold. Cold homes can also promote the growth of fungi and numbers of house dust mites. The former can damage the fabric of the building, whilst both fungi and dust mite allergens, can lead to respiratory diseases which reduce quality of life by enforced absences from work / school and restrict types of activities and employment.
- 1.20.4 Whilst all individuals may suffer from cold related illnesses older people, young children, householders who are disabled or householders suffering from long-term illnesses are particularly vulnerable. Social circumstances mean that these groups are more likely to spend longer periods of time in the home.

1.21 FUEL POVERTY IN SEFTON

Whilst the definition of fuel poverty is very precise measuring it and assessing it is very subjective. Below is a sample of the various sources and we use to gauge the problem.

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- 1.21.1 The Sefton private sector housing stock condition survey, conducted in 2007 found that the average household energy costs were £750 p.a. - this is before recent high profile rises in costs and ignores costs incurred by using prepayment meters common in low income households. Figures published nationally by the NEA (national fuel poverty campaigning organisation) highlight that average combined fuel bills now stand far higher at £1,288 by 2009.
- 1.21.2 The Sefton private sector housing stock condition survey found that 4,211 dwellings represented a category 1 Hazard under the Housing Health Safety Rating System for Excess Cold. A further 11,016 exhibit Excess Cold as a category 2 hazard. This is supported by the Non Decent Homes statistics on thermal efficiency where 7,753 dwellings failed. The survey estimated 10,909 households were considered to be in fuel poverty, representing 11.1% of private sector households. Whilst this is a significant improvement on 2002 survey results (at 19%) this does not take account of major price rises which have a significant impact on bills.
- 1.21.3 A macro analysis of Sefton Fuel Poverty statistics (March 2003 by CSE/Bristol University) found that 28% of households suffered from fuel poverty (31,893 households) compared to an England average of 23%. This report identified Merseyside as the worst County in England.
- 1.21.4 Department of Energy and Climate Change, which has responsibility for monitoring the Government's Fuel Poverty Strategy has recently published some experimental figures to identify fuel poverty levels at Local Authority Level. The results for Sefton show it at 13.7% of households for 2006 (which is 97th worst the league table for England). This compares to Liverpool at 15.8%, Wirral at 15.3%, 13.2% for St Helens, 12.3% for West Lancashire and 11.7% for Knowsley.
- 1.21.5 The high scores reflect the combined influences of high levels of deprivation, older housing and inadequate heating systems that are common problems in parts of Sefton. The scale of the problem is represented by the stark statistics of excess winter mortality experienced here in Sefton at an average of 198 deaths p.a. (based on a 5 year average). We have shown significant improvement from 276 deaths pa in 1999/2000.
- 1.22 **SEFTON AFFORDABLE WARMTH STRATEGY (SAWS)**
 - 1.22.1 Sefton's Affordable Warmth Strategy (SAWS) has been fully developed since publication in February 2007 and 1st Review in June 2008, led by Sefton's Energy Team. It involves key partners from across the health, statutory, community and voluntary sectors. It provides the framework for actions and joint working between agencies to address the problems of *Fuel Poverty* faced by Sefton residents.
 - 1.22.2 The Council and partners recently agreed the 2nd Annual Review to reflect upon what has been achieved and to refresh the strategy taking into account any changes in legislation and policies in order to ensure aims, activities and targets continue to be focused in the relevant areas. After approval at Cabinet Member - Health and Social Care, to be reported on 23rd December 2009, the Sefton Affordable Warmth Strategy Review 2009 will be circulated widely to publicise the updated aims, activities and targets.
 - 1.22.3 The strategy is co-ordinated and led by the Council but is a partnership of many mutual interests and at a recent count involved over 70 organisations. The strategy is informed by a key partner steering group which includes the following;

- ◆ Sefton Primary Care Trust- Steph Griffiths & Val Frampton
- ◆ Sefton CVS - Mike Mainwaring
- ◆ Housing Improvements Section - Steve Terry
- ◆ Age Concern - Dawn Stewart
- ◆ Sefton Pensioners Advocacy Centre - Margaret Lambert
- ◆ Sefton Local Pensions Service - Elaine Waddington
- ◆ Environmental Protection Department - Bob Hannah
- ◆ Anchor Staying Put - John Sandiford
- ◆ Linaker Childrens Centre - Jan Sanders
- ◆ Merseyside Fire & Rescue Service - Maureen Justice
- ◆ Energy Saving Trust Advice Centre (ESTAC) – John Vinson
- ◆ One Vision Housing Association - Geoff McKeating
- ◆ Health & Social Care - Sharon Lees

1.30 NATIONAL INDICATORS AND OTHER STATUTORY PRESSURES

- 1.30.1 Local Area Agreement (LAA): The March 2007 Local Area Agreement for Sefton adopted 11 Headline Priorities, with one these target measures being to “Reduce fuel poverty and associated suffering”. As a core stretch target there is a £800,000 reward element associated with achieving the target within the time period (this is dependent on the other targets being achieved for a sum total of £8 million reward).
- 1.30.2 The indicator is measured by the number of properties below SAP 35. SAP is the Standard Assessment Procedure which measures energy efficiency of homes, using a scale of 0-100, anything below 35 is considered extremely poor, new builds achieve over 80. Sefton’s target was to reduce this to only 10,233 properties by March 2010 (lifting 600 properties above this poor performance level).
- 1.30.3 Our results to March 2009 show we have achieved this already and even exceeded it as we can report that there only remains 9,217 properties of SAP 35 or below and we are working to reduce this number even further.
- 1.30.4 In addition National Indicator 187 measures a fuel poverty proxy, which Sefton will be required to report upon annually. It uses the two standards of SAP 35 or below (considered fuel poor) and SAP 65 (considered safe from fuel poverty concerns). However it only measures the housing of those on means tested benefits. The results for last year are:
- ◆ 7.07% households on means tested benefit with a SAP rating below 35
 - ◆ Actual Value 33.77% households on means tested benefit with a SAP rating of 65 or above
 - ◆ Based on 679 households on income related benefits for which SAP assessment has been carried out

1.40 FORWARD PLAN 2010 AND BEYOND

Through the Home Energy Saving Strategy the Government is consulting on long term plans to change the key drivers for domestic energy saving and the types of action needed to achieve a 60% saving on CO2 emissions for UK Plc activities (statutory and an aspiration for an 80% cut). It is estimated that the housing market will at least have to deliver its 60% if not more of the savings *pro rata*. The actions detailed below are the anticipated models of activity planned for the future.

1.41 COMMUNITY ENERGY SAVING PROGRAMME (CESP)

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- 1.41.1 In September 2008 the Government announced a package of initiatives designed to help people to reduce their fuel bills, whilst also ensuring that the most vulnerable receive help. One element of this package is the Community Energy Saving Programme (CESP). It aims to deliver around £350m of carbon saving packages in homes by 2012. This also helps tackle climate change, and CESP will contribute to the UK ambition of an 80% greenhouse gas reduction by 2050.
- 1.41.2 CESP places an obligation on energy suppliers and electricity generators to meet a CO2 reduction target by providing energy efficiency measures to domestic consumers. These measures must be delivered to households in areas with high indices of multiple deprivation in Lowest Super Output Areas (LSOA).
- 1.41.3 The Government published a list of 4,000 Lower Super Output areas that are eligible nationally, of which 30 are in Sefton. Due to the potential value of funding at stake (up to £3.5M per project) and short timescales involved, the Energy Team have made already made open contacts with utility company's to importantly present Sefton's readiness to participate with some outline ideas and profile statistics on our LSOA's. With assistance from Housing Market Renewal these have been filtered down to the most likely candidate areas.
- 1.41.4 It appears that as programmes evolve utilities will be seeking match funding from local authorities and housing associations probably up to 20-30% of the total costs.

1.42 MERSEYSIDE RENEWABLES & ENERGY EFFICIENCY IN COMMUNITY HOUSING (REECH)

- 1.42.1 In September 2009 the NorthWest Development Agency (NWDA) issued a call for European Regional Development Funding (ERDF) to be allocated to Housing works for Energy Efficiency and Renewable Energy improvements. The NWDA requested bidders to form sub regional expressions of interest.
- 1.42.2 The Liverpool City Region (Merseyside including Halton) submitted an expression of interest for a programme of works totalling £22.8 million, entitled "Merseyside REECH". ERDF were offering up to 50% of the funding with the balance likely to be made up from CESP/utility funding, Housing Associations and Local Authority funds. The expression was led by Sefton and included a programme of 5,000 property improvements.
- 1.42.3 The consortia of partners included all Local authorities, many Registered Social Landlords, Universities and voluntary sector partners. Sefton have since been invited to submit a concept form to work up the proposal by January 2010.

1.43 LOW CARBON COMMUNITIES CHALLENGE

The Council is supporting a bid from Formby Parish Council to access a funding call by DECC to fund community actions up to £500,000 for significant programmes of CO2 emission reduction. This is a competitive call for up to 12 projects to gain funding in England and Wales.

1.44 FORWARD PLANNING and FINANCIAL PRESSURES

- 1.44.1 To date the energy team has achieved these outcomes with no core delivery budgets and limited access to any opportunity funds internally (no annual allocation in the

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Housing Capital Programme). Therefore use of external funding has been paramount to the delivery of programmes and stock improvement.

- 1.44.2 Furthermore the domestic housing part of the energy team has two housing orientated staff funded by the Council, a service level agreement with a local charity (costing £14K) and two externally funded staff by the Supporting People Programme on a fixed term contract (contract ends March 2011).
- 1.44.3 Many of the current funding streams that have allowed much of the activity are due to end this or next financial year (March 2011). So the securing of the above schemes is crucial to maintain the level of service to residents and the council. The energy team will be negotiating with key partners such as NHS Sefton, Supporting People and utilities over the next year to secure future funding

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2.0 PART TWO - CORPORATE ENERGY PROGRESS

BACKGROUND

- 2.01 Since 2004 the Energy Team have been responsible for the management of all Corporate energy matters in terms of Strategy, utility procurement, Carbon (energy) reduction and water conservation.
- 2.02 During the period since the new part of the team was put in place the Council has been extremely successful in reducing energy consumption, effective savings and overall carbon reduction across the Council.
- 2.03 As projected throughout this period new Statutory Obligations have been introduced and/or are now imminent which justify the Councils approach in delivering challenges such as the new National performance framework NI's, Carbon Reduction Commitment and increased carbon targets.
- 2.04 This section of the report briefly summarises the key headline operational and strategic progress during 2008/09 through the Corporate Energy agenda.

2.1 SEFTON CARBON MANAGEMENT PLAN

- 2.1.1 Many organisations recognise the essential role of resource efficiency in addressing the multiple challenges of climate change that we now face. Sefton Council therefore, wanted to set an example in this respect, leading to the development of new policies, culture and technologies that can assist the Council and its stakeholders to address many challenges by reducing our own carbon emissions.
- 2.1.2 In 2006 Sefton became one of only 25% of UK Local Authorities and the first on Merseyside to develop a contemporary and relevant approach to Carbon Management.
- 2.1.3 As a Council Sefton wanted to:
- Bind together **all** the existing Council approaches and strategies which were working towards emissions reduction and integrate into the Councils performance systems.
 - Demonstrate current baseline of carbon emissions as a result of Council operations and identify key areas for savings.
 - To achieve a significant level of ownership and employee involvement in the ultimate implementation of Seftons Carbon Management Plan.
 - Secure internal funding streams or protocol to aid investment towards achieving savings.
- 2.1.4 Scope of our Carbon Management Plan (CMP): Many other LA's chose to scope their plans to only include energy. But from the beginning, Sefton had the desire to widen its scope considerably and to bring **all** its operational carbon arisings into the plan over 2 phases:
- Phase 1 (Initial Year 1 scope for CMP)
- Council owned and operated buildings (non-domestic) inc. schools.
 - Street lighting
 - Green Transport/Travel
 - Waste management

- Procurement standards

Phase 2 (after embedding period to be pursued from Year 2 onwards)

- Information Technology (equipment management)
- Fleet management
- Planning

2.1.5 Since the launch of our Carbon Management Plan we have realised added strategic and operational advantage including:

- Attraction of external funding e.g. SALIX loan fund
- Meeting external bid criteria.
- Formal Council policy - carrot and stick (enforcement).
- Assimilation into Council performance measurement.
- Early preparation for forthcoming legislative intervention i.e. Carbon Reduction Commitment and EU Buildings Directive (Display Energy Certificates)
- New National Performance Indicator NI 185 CO₂ LA Operations - the assessment tool is based upon Carbon Mgt Plan methodology.
- New Carbon Reduction Commitment preparedness.

2.1.6 Sefton's headline Carbon Management Plan targets are:

- To reduce our carbon emissions from Council owned and operated buildings by 2,100 tonnes in the period 2006 to 2010.
- To reduce carbon emissions through greener transport use by 12 tonnes
- To reduce our carbon emissions by increased recycling by 33,214 tonnes

Equating to a total 12% reduction in total Carbon Emissions by 2010.

2.1.7 Whilst Sefton's Carbon Management Plan represents a quantifiable strategy to reduce carbon emissions, it means a great deal more by way of outward stewardship to all our stakeholders.

2.1.8 Residents are encouraged to see the positive steps taken by their own Council to be inspired to change their own behaviour and physical environment. We back our residents up at every single step with the advice they need to make a change.

2.1.9 It seems too that Sefton's reputation as a carbon management authority has a wider reach than we expected. At the request of the British Council in October 2007 a delegation of senior government and local government officials visited Sefton to learn much more about how we are tackling our impacts on climate change by an innovative range of methods, with Carbon Management at the hub.

2.1.10 Their visit has had a real bearing on how they develop new approach in the Ukraine and our relationship as mentor has continued with Sefton acting as the EU best practice exemplar to the British Council and Embassy Projects.

2.1.11 The most recent 2007/08 quantitative update has proved that we have already reached the target our achievements for the first 2 years by delivering a progress carbon reduction of 13.26%.

2.1.12 The real intention for Sefton is to raise the bar on itself and seek to set best practice in adoption of practices and technologies to drive down its carbon emissions ever lower aided by increasingly accurate data measurement especially in overcoming data backup issues with Utilities.

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2.1.13 The Council have begun a comprehensive strategic review to take our delivery to the next level. This will include: all elements of Seftons environmental policy and operational responsibilities. The findings of this review will be presented by February 2010.

2.2 ENERGY AND WATER CONSUMPTION DATA MANAGEMENT

2.2.1 The key to progressive energy management is based on possession of good data to enable accurate monitoring and targeting of potential savings

2.2.2 Oil, gas and electricity data is received and entered monthly. The supply of data to appropriate personnel also acts as an enormous step towards energy awareness and should be the catalyst to other good housekeeping actions therefore, it proves to be the one of the most effective methods in achieving energy saving. It is generally quoted by The Carbon Trust that good housekeeping can save as much as 10%.

2.2.3 The principle option to enable a comprehensive and constant data supply from our current suppliers is via E-Billing. The Energy Team is currently working closely with the Finance Department and the Council's utility suppliers to assess the feasibility of e-billing for the Councils electricity and gas accounts.

2.2.4 We have been successfully running e-billing for United Utilities Water bills for all Council Civic buildings since 2008 and this has proved to be successful and supported budget monitoring.

2.2.5 A move to wider e-billing would not only enable systematic auditing of invoices to ensure reliable financial control and planning but also free up time for other proactive energy savings work including individual site surveys and advice.

2.2.6 There is also an industry accepted relationship between higher quality of data and tendered prices. To this end, e-billing allows the incumbent or potential supplier to accept the data for our whole asset portfolio 'as is' because reduced data errors in turn reduces their risk in tendering. E-billing also helps ensure firmer adherence to 28 day payment terms, again giving less cash flow risk to suppliers.

2.2.7 In order to further support the role of e-billing, the energy team are beginning to roll-out a reporting portal. This function allows sites to enter their meter readings through a website portal which automatically checks for anomalies and then uploads the readings onto the energy team database.

2.2.8 This new source of data and the ability to check the information provided against programmable benchmarks, strengthens the data used for remits such as the CRC, DEC's and NI's.

2.3 UTILITY BILL MONITORING AND RECONCILIATION

2.3.1 Invoice validation had proved very cost effective uncovering errors ranging from incorrect tariffs to incorrect charging of Climate Change Levy. These savings amount to circa £900K to date with several sites still at detailed query stage.

2.3.2 Efforts in resolving queries, frequently several years old, have proved very positive. Working closely with the relevant accounts departments, site managers and visiting sites to obtain accurate meter readings - has made it possible to reconcile invoices.

- 2.3.3 Sefton's Energy Team is addressing the issue of estimated site invoices. In order to further support the role of e-billing, the energy team are beginning to roll-out a reporting portal. This function allows sites to enter their meter readings through a website portal which automatically checks for anomalies and then uploads the readings onto the energy team database.
- 2.3.4 This will ensure sites are paying for what they use, facilitate accurate financial forecasting and enable correct energy monitoring and targeting for each site.
- 2.3.5 The work undertaken to build a reliable energy management database (Systemlink) over the last 12 months has added value to the reporting function in relation to energy consumption and savings targets. Systemlink has the facility to produce various reports, from single site data through league tables and importantly requisite National Indicator and CAA reports including Use of Resource assessment.
- 2.3.6 Work is also being undertaken to review the current banding of Sefton's sites under the new Surface Water charging model introduced by United Utilities. Working with the consultancy firm, Hanover partnerships, the energy team have been able to interrogate and correct boundaries proposed by United Utilities, resulting in refunds for those sites effected. A full report detailing refunded monies to Sefton will be scheduled for Cabinet Member review in the new year.

2.4 UTILITY PROCUREMENT

- 2.4.1 A report was submitted to Cabinet on 11 June 2009 detailing the results of the contract price renewal exercise for the supply of gas and electricity to multiple properties and Street Lighting within the boundaries of Sefton Council for the period 1 September 2009 to 31 August 2011.
- 2.4.2 The officers of the Energy Team tracked the trading markets daily during the period up to May 2009 seeking the optimum period to purchase utilising the in-house designed E-Procurement protocol. During this period the general trend of the energy markets was generally, except for small peak fluctuations.
- 2.4.3 The global economic downturn and its subsequent effect on anticipated energy requirements has been a major contributing factor to the continued reduction in energy prices.
- 2.4.4 Due to prudent timing of this procurement round the Council was afforded advantage of lower prices. A summary of the prices/tariff rate offer and percentage decreases are detailed below:

Gas (Scottish and Southern): - 32.37% (average price decrease against 08/09 contract)

Electricity (ScottishPower): - 28.92% (average price decrease against 08/09 contract)

Note: This reduction is spread over financial years as the contract runs from 1 September to 31 August each year. These figures refer to the energy contracts only and do not relate to financial budgets, forecasts or actual payments. It should also be noted that each directorate will have a proportionately different percentage increase due to make up of buildings portfolio.

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- 2.4.5 There will be changes in energy management and procurement with the advent of carbon trading which will require new skill sets for Councils. The new arrangements will run to the expiry of the current supply contracts and during this time the Council will evaluate the impact of new statutory requirements and Government recommendations in procurement of energy through consortia e.g. OGC. Further reports on this will be presented to Members in due course.
- 2.4.6 Going forward there are many factors that are likely to facilitate prices increase in the energy markets such as an up turn in the world economy, tightening on Carbon Trading, issues in nuclear production and weather uncertainty. However, there are very few influences to create a reduction in prices that have not already been factored in. Although energy prices are extremely unpredictable it is felt by many specialists that energy prices have hit the bottom of the trend.

2.5 DISPLAY ENERGY CERTIFICATES

- 2.5.1 From 1st October 2008, occupiers of buildings over 1000m² with public access will need to display a Display Energy Certificate (DEC). A DEC is an energy efficiency rating from the building on a scale of 'A to G' and must be renewed annually.
- 2.5.2 This obligation was introduced by law and is enforced by Trading Standards Officers in accordance with the EU Energy Performance of Buildings Directive (EPBD) guidelines.
- 2.5.3 The legislation also enforces the requirement to have an accompanying advisory report that informs the occupiers of opportunities to improve on their rating. This report, known as an Energy Performance Certificate (EPC), will be required if a building is for sale, rent or is a new construction. This EPC is currently being used by DCSF in a research project at Freshfield Primary school in an attempt to improve the building's energy consumption.
- 2.5.4 All qualifying sites were issued with their first DEC and advisory report last year and are currently being issued with their report for the next 12 months.
- 2.5.5 The main aim of this EU programme is to reduce the amount of carbon emissions produced by our non-domestic buildings. It is hoped that the scheme will also encourage people to consider the efficiency of equipment and materials when embarking on a new construction or refurbishment of an existing property.
- 2.5.6 A review of the performance of Sefton's portfolio will be carried out once all sites have been issued with their new certificate.

2.6 WATER SAVINGS PILOT PROGRAMME

- 2.6.1 Sefton's Energy Team have embarked upon a pilot research project with United Utilities in an attempt to prove water savings in schools. The project is being delivered by Aqualogic and funding will come from United Utilities.

- 2.6.2 We have identified 22 sites within Sefton and the aim of the project is to significantly reduce water consumption within a 24 month period within a budget of approximately £ 2 per pupil.
- 2.6.3 The figures so far show a potential average reduction of 40% with most sites presenting a payback of less than 8 months. The monitoring period will begin on installation and continue for a period of 2 months. After this monitoring period is completed a report will be produced identifying the performance of the technologies selected and their suitability for other sites.

2.7 SALIX

- 2.7.1 In April 2007 Salix Finance Ltd provide a grant of £50K to pump prime an energy efficiency programme affecting all components of Sefton Council's buildings, initially in Civic/Admin buildings. The Council matched this grant to make up the total 'invest to save' ring-fenced fund of £100K.
- 2.7.2 Monies to implement energy saving projects have been provided by this new fund through interest free internal 'loans'. Loans are repaid by using a minimum of 75% of annual savings gained by the building/portfolio. Once the project loan has been repaid into the fund, the project recipient will of course continue to benefit from the energy savings in years to come. As these repayments have been recycled back into the fund they have become available for re-investment, in a self-sustaining energy efficiency investment fund.
- 2.7.3 From energy audits carried out on the major buildings occupied and or owned by the we have identified and implemented a number of energy saving projects examples listed below:
- Bootle Town Hall - roof insulation
 - Crown Buildings - boiler
 - Good Shepherd - cavity wall insulation
 - Bootle Town Hall - roof insulation voltage optimisation
 - Pendle - cavity wall
 - Various Sites - water heater controls
- 2.7.4 Since the first tranche of investment in 2007, the schemes have already established £441K of lifetime energy and 2,800 tonnes of carbon savings to the Council.
- 2.7.5 Due to the strength and success in delivery of SALIX in Civic Buildings we hope to expand the scope of the fund to match fund and potentiate other areas such as Street Lighting and Signals to achieve net savings.

2.8 CARBON AND WATER SAVINGS STAFF CAMPAIGN

- 2.8.1 The Energy Team plans to launch its revised Waste Busters energy and water saving campaign in 2010. The Carbon Trust estimates that organisations can save up to 10% by implementing an awareness campaign and this equates to a saving of more than £ 800,000 for Sefton Council each year, if effectively applied.

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- 2.8.2 Support from top down is pivotal and should be visible to all staff in the organisation in order to ensure it successfully embeds into the organisational culture. The Energy Team plans to obtain this top-level support before the campaign is rolled out and will consider providing training materials for the in-house management training scheme and new-starter induction.

2.9 SUSTAINABLE SCHOOLS

- 2.9.1 The Energy Team is supporting Children Schools and Families (CSF) in delivering the Sustainable Schools framework to Sefton's schools. The framework is a Government initiative aimed at embedding sustainable development in school practices and will be subject to OFSTED reporting in the future.
- 2.9.2 Through helping CSF identify ways in which to address energy and water saving on a curriculum, campus and community level, we are ensuring that our schools are exemplars to others. Schools such as Marshside and Ainsdale St Johns have been cited by the CSF and Community groups as examples of best practice and continue to inspire other schools in this area.
- 2.9.3 Our work on this framework has now developed to support Governors, Councillors and Parent Groups in encouraging sustainable behaviour and decisions at school and in the community. This work reflects in the schools budgets also as reducing energy means financial savings.

2.10 LEISURE SERVICES DEPARTMENT

- 2.10.1 The Energy Team have been working closely with Sefton's Leisure centres for several years and have helped them achieve high scores on the Energy and Environmental sections of the QUEST assessments. In the past few months, this support work has been given new direction and an improvement plan has been developed.
- 2.10.2 The Energy Team are in the process of completing energy surveys at all of the leisure centre sites and will produce a report detailing all improvements that can be made and targets to aim for in the future such as renewable energy options.
- 2.10.3 The Energy Team has produced a bespoke energy policy for each site detailing reduction targets and pledging monitoring of consumption.
- 2.10.4 A full bill audit is in the process of being carried out to ensure the utility companies are charging at the correct rate and the readings are accurate.
- 2.10.5 A full training pack was issued to all centres for their induction procedures and staff development. When the new Waste Busters campaign is completed, this will replace the training pack to ensure that the message is renewed and kept interesting.
- 2.10.6 All leisure centre sites will be able to submit their meter readings electronically now through the training given by the Energy Team on how to use the portal.

2.11 EU EXEMPLAR: SEFTON - UKRAINE

- 2.11.1 In October 2007 Sefton originally welcomed an official delegation from Ukraine, whom as part of a British Council programme, were visiting the UK to see how national and local government are addressing the challenges of climate change through energy efficiency and renewables. This was a very positive visit for the Ukrainian delegation and they especially enjoyed their time in Sefton, welcomed by the Mayor, visiting examples of excellent practice including the Eco Visitor Centre, the new Splashworld and St Jeromes School.
- 2.11.2 On the strength of this, Sefton's Energy Team were invited to represent the UK and EU perspective as exemplars and participate in a regional seminar under the project "Regional Campaign on Energy efficiency", a two year public diplomacy project, implemented by the British Embassy and the British Council in Ukraine.
- 2.11.3 The aim of the project was to raise awareness among local authorities and local communities in Ukraine of the benefits of low-carbon, energy-efficient utilities, and to assist them to access EU and British schemes and expertise.
- 2.11.4 This was done through two visits arranged by the British Council, the first was in February 2008. Where a member of the Energy Team attended the first regional seminar in Kharkiv, Ukraine. This brought together Ukrainian city authorities, scientists and media to address issues of communal energy efficiency and urban environment.
- 2.11.5 The programme then progressed to a large conference on 15 and 16 May 2008, hosted in Sudak on the southern Crimean coast. Where we returned to present a paper relating Sefton's experiences in energy, carbon and renewables in light of current and forthcoming EU legislation. This generated a great deal of interest and discussion including for example, strong interest in our Southport Eco Visitor Centre that would be something the regional Crimean Government wish to replicate.
- 2.11.6 Finally in March 2009, the British Embassy and BBC World Service visited Sefton on a follow up media tour, bringing both Ukrainian National TV Channels to produce a documentary on UK/EU best practice, demonstrated by Sefton in energy and renewables.
- 2.11.7 Whilst the EU Exemplar project has now ended, the exchange of ideas has left strong friendships and continued dialogue especially with Kharkiv City Council in the North of Ukraine and new contacts in Sudak and Crimea in the South. Overall, this experience has put Sefton Council as a beacon of good practice at an International level.

2.2 FORWARD PLAN 2010 AND BEYOND

- 2.2.1 There are developing pressures facing the Council which will require even greater response to be made, with the common driver of mitigating climate change through reducing carbon emissions and water consumption.
- 2.2.2 Clearly the impacts and plans in response to the risks and opportunities of these challenges will be brought before members in due course. However, the developing issues include:
- CRC Carbon Reduction Commitment
 - Increasing pressures on water charges
 - More stretching Carbon Savings Targets developing

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- Measurement of progress via NI 185 and NI 188
- Stability of energy supply markets and future increases.
- Council ability to invest to save and achieve available carbon/revenue savings
- Expansion of DEC requirements

3.0 PART THREE - ECO EDUCATION SERVICES

- 3.01 The award winning Southport Eco Visitor Centre provides fun, hands on, environmental education visits for school groups. The classroom at the Centre was been fitted with a range of impressive equipment and has been open for visitors for over 4 years. In this time over 11,000 children and accompanying teachers, have been educated and inspired to do their bit, no matter how small, for the environment.
- 3.02 Whilst the in house educational sessions are the core service of the centre, this expertise on the rapidly growing agenda of environmental education and awareness across all ages and groups has afforded the Team opportunities to develop far broader interventions and types of education work across Sefton. The key highlights in 2008/09 are appraised below:

3.1 MENU DEVELOPMENT

- 3.1.1 The educational visit programmes were developed from scratch to meet the needs of teachers in school, particularly to fit closely with the National Curriculum in Key Stages 2 and 3. Visits are packed with innovative, interactive activities and really have the 'wow factor'.
- 3.1.2 Because of this they are memorable with the visiting children, ensuring the environmental lessons learned stay with them for a long time after their actual day with us. The educational officers ensure, therefore, that all visiting children go away aware of simple things they and their family can do for the environment here in Sefton and how it helps the greater challenges of climate change.
- 3.1.3 There are now a core of 13 menu educational days for schools to choose and enjoy covering a very wide range of environmental topics including:
- Energy Saving, Renewable Energy
 - Climate Change
 - Water Conservation
 - Environmental Issues in the News
 - School Travel Plans, Transport Issues
 - Coastal Management
 - Eco-Schools
 - School Council Seminar
- 3.1.4 All days are National Curriculum and Qualifications and Curriculum Authority linked, allowing teachers to use them to effectively complement work being done in their schools. The days link effectively with a range of subjects including Citizenship, Geography, Science and Information Technology. This is an added advantage with preparedness and up front compliance with the new UK National Curriculum links to Climate Change introduced in 2009.
- 3.1.5 Feedback is always excellent from teachers, children and accompanying adults and return visit rates are high. Some comments made by teachers include:

“Absolutely fantastic – children were engaged, focussed and active learners! Very impressed with differentiation – all abilities able to be involved”

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“The visit to the Eco Centre was exactly what we wanted to help the school council understand how and why we should aim to reduce energy waste and recycle more. We came away with lots of ideas for projects we can work on to make our school more ‘environmentally friendly’. A really worthwhile trip!”

- 3.1.6 Upon return to school it is commonly fed back that children (and teachers) have been full of enthusiasm as a result of their day at the Centre, which has led to positive knock-on effects in school and the wider community.
- 3.1.7 These important initiatives are already planned for expansion in number and variety with a wider selection of educational programmes on offer to schools. The diary is already busy with both regular visitors and new schools for the current academic year, some choosing favourite days which they know fit in perfectly with their curriculum back at school, others keen to try the new days we have on offer.
- 3.1.8 Menus are currently being re-developed to take into account that many schools are currently embracing the new ‘Creative Curriculum’ for 2010. There is also potential to add new themed days, particularly based on the positive evaluations from visiting schools when we have been asked to focus on something not currently noted in the existing menus (Weather & natural disasters, renewable energy pro’s and con’s debate etc). We are currently approaching a variety of schools to get a better understanding of which avenues schools are going down with regard to creative curriculum.

3.2 IMCORE (INNOVATIVE MANAGEMENT FOR EUROPE’S CHANGING COASTAL RESOURCE)

- 3.2.1 IMCORE is funded under the Interreg IVB programme, the €6m IMCORE project will be led by the Coastal & Marine Resources Centre in University College Cork until its end in 2011. Sefton are one of the key Partners in this.
- 3.2.2 There is an urgent need to increase our capacity to respond to the Ecological, Social and Economic impacts of climate on the viability of coastal sectors such as fisheries and aquaculture, ports and shipping, marine recreation, and the defence of coastal communities from flooding and erosion.
- 3.2.3 To date, most attention has been focused on predicting the types and rates of change likely to occur but what is needed now is a method to identify the adaptation measures that need to be applied to coastal use and management.
- 3.2.4 Through IMCORE, Sefton wish to develop an adaptation strategy for the coast and to achieve this we need to be able to have an informed debate with stakeholders. This means that we need to understand the implications of coastal change (including climate change) upon the future evolution of the coast and need to be able to communicate the key issues and processes to stakeholders (including young people) before developing the adaptation plan.
- 3.2.5 The Energy Team's role is to develop understanding and learning of social, environmental and economic aspects of the coast. We are responsible for input into the implementation of on-site interpretation both in the form of guided walks and on-site displays, presentations to local interest groups, Councillor briefings and delivery

of educational materials in partnership with other key local partners. Educational materials would also be presented to local teacher training colleges to encourage use.

3.2.6 Good progress is being made, working closely with the coastal defence team to produce an interactive resource to help local children grasp the concepts of protecting Sefton's coast facing climate change, through both adaptation and mitigation. Study tools are being developed for primary and secondary students, backed up with cross curriculum linked lesson plans/curriculum links to a variety of key stages in the following areas:

- Coastal processes
- Climate Change
- Sea level rise and increased storminess
- Warmer, wetter, winters and hotter, drier summers
- Mitigation
- Adaptation

3.2.7 We have already held a successful IMCORE themed day at the centre, where 5 schools from different wards in Sefton were invited to work together. The resources are targeted for delivery in all Sefton schools in Spring 2010. An adult education resource and the promotion of a new (IMCORE subsidised) Eco Centre IMCORE day will follow

3.3 SCHOOL VISITS TO CENTRE

3.3.1 Excellent progress in developing links with new schools whom have now previously utilised the service of the centre, many from out of the Sefton area and creating repeat bookings/income.

3.3.2 During the period April 08-July 09, due to maternity leave the centre only had 1/2 an officer in place to run classes. However, still achieved a solid level of service:

April 2008 – Dec 2008:	1,175 pupils
Jan 2009 – Nov 2009:	1,443 pupils

3.3.3 A high number of bookings have already been taken for 2010. Many schools have also identified the centre for potential alternative curriculum activities, particularly amongst disaffected pupils.

3.4 REVISION OF EDUCATIONAL DISPLAYS

3.4.1 New designs have been drawn up, with more focus on interactive features, in an attempt to not only expand engagement with visiting pupils, but also the visitors to the centre using the park and ride facility to engage and communicate the developing issues around climate change.

3.4.2 The Energy Team are currently working with a number of partners (Costal Management, STPU, Cycle England) to address needs and to identify secure methods of funding the update work.

3.5 SEFTON YOUNG ECO CHAMPION

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- 3.5.1 Inspired by the many amazing young people who have visited for educational visits, the Eco Centre first set out in 2008 to reward Sefton pupils who were setting an example to others with their environmental ideas, actions and enthusiasm. We particularly sought one Sefton 'champion' who exemplified an ongoing commitment to caring for their local environment.
- 3.5.2 Sefton's Young Eco Champion had to be someone who cared about the environment and takes action to improve theirs. They must be an inspiration to others by demonstrating how we all can 'do our bit' to make a difference.
- 3.5.3 Candidates could be exceptional members of a school eco club or might have set an example to others in the 'green' way they live their lives - basically, they needed to 'go the extra mile' for the environment, setting a good example for others and thinking of innovative ways of playing their part in caring for the planet.
- 3.5.4 When in post, the winner receives support in writing a termly 'diary' of eco tips which are included on Sefton Council's website for their year as Sefton's Young Eco Champion.
- 3.5.5 Following on from the success of last years appointment whom won national awards for his efforts, the 2009 competition was opened up to all schools in the borough whom were invited to nominate pupils who demonstrated a commitment to the environment and an understanding of how their work supports broader green issues.
- 3.5.6 Winners were chosen in 8 categories to tie in with the sustainable schools framework including team of the year, energy and water, and travel and traffic - with John Shaw scooping the overall prize of Sefton Young Eco Champ.
- 3.5.7 The new Champion, John Shaw of Crosby High has been following in his predecessors footsteps and actively promoted his work via a number of channels (presentations, website blog, local press) and is actively engaged with the centre. Furthermore, Energy Team staff are currently engaged with all those shortlisted for the award to create avenues for good eco promotion.
- 3.5.8 A Champions Reunion Event for all the category winners is planned for January 2010, where all councillors from the schools wards will be invited to participate and learn more about what the children are doing.

3.6 USE OF CYCLE TOWN/CYCLE PARK FOR VISITING SCHOOLS

- 3.6.1 Visitors to education sessions are now being encouraged to use the new cycle storage provision at the centre. We are currently working with the Cycling Touring Club and Greenbank High School, where the pupils will all travel to the school via cycle and take part in a transport alternatives/school travel plan workshop.

3.7 OUT-REACH TO SCHOOLS AND OTHERS

- 3.7.1 Outreach work in a number of schools, in support of sustainable schools and even some requests from out of the borough, creating potential future bookings and allowing better networking to increase the educational profile of the centre. In some cases this includes setting up and supporting Eco Teams within Sefton schools.

3.8 NON SCHOOL/COMMUNITIES WORK

- 3.8.1 In recent months we have built on non-school/community use of the centre, including Youth Clubs and Young Carers. We have also been actively involved with Merseyfire (a charitable extension of the fire brigade) and the Bright Sparks campaign working with volunteers aged 16-25 who are neither employed nor involved in education and training to develop an innovative session based on energy awareness. The first session was a great success, and has led to future bookings in early 2010.
- 3.8.2 We are also currently in liaison with Energy Projects Plus, to deliver a variety of education sessions to community groups, with an initial 'stall' set up on the public concourse in an attempt to consult and understand what areas people are interested in and where current gaps in knowledge/delivery exist. We also plan to hold a session with chairs of governors to enable better understanding of their role in the sustainable schools framework.

3.9 FORWARD PLAN 2010 AND BEYOND

- 3.9.1 The new Sustainable School framework and Creative Curriculum creates a great deal of opportunity to build on the existing menu and look at developing it further. However, there are a number of issues to be overcome at this stage:

- Outdated classroom equipment, in urgent need of refresh and is impeding development/quality of services
- Need to identify a key figure in CSF to enable the Councils approach to the sustainable school framework within schools at a curriculum level
- Eco centre currently has separate website, which attracts new schools and could be used to more potential, to be supported by ICT.

3.9.2 Potential Plan/Ideas

- Production of termly Eco Magazine, working with schools/youth groups
- Podcasting via website to communicate all issues for schools and communities on climate change.
- Better links with local business to promote centre and to enable them to address their own carbon footprint
- Events to invite pupils who have visited prior to come in with parents so they can take the role of 'educators'
- Expanded use of the Eco Classroom outside core school hours.

4.0 RECOMMENDATION(S):

- (i) That Cabinet Members note this report for information
- (ii) Members congratulate the various external cross sector partners in delivery of activities in this report.

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REPORT TO: Planning Committee
Cabinet Member: Regeneration
Cabinet

DATE: 16th December, 2009
16th December, 2009
17th December, 2009

SUBJECT: Review of the HMRI planning framework

WARDS AFFECTED: Linacre, Derby, Litherland, Netherton & Orrell

REPORT OF: Andy Wallis, Planning & Economic Regeneration Director

CONTACT OFFICER: Ingrid Berry

**EXEMPT/
CONFIDENTIAL:** NO

PURPOSE/SUMMARY:

1. To confirm that the extant planning framework provided by saved policies in the UDP, Supplementary Planning Guidance & Development Briefs is still relevant to the HMRI programme, and
2. To assess the impact of changes that have taken place since this was put in place, including:
 - Changes to the housing market as a result of HMRI intervention, and the impact of the credit crunch;
 - The adoption of the UDP and approval of the North West of England Plan, Regional Strategy to 2021 (RS);
 - The work done and studies commissioned to support the preparation of the core strategy; and
 - The implications of human rights legislation.

REASON WHY DECISION REQUIRED:

To confirm that the planning framework is up to date and fully supports the Council's resolution to make further Compulsory Purchase Orders (Minutes 83 and 84, Cabinet, 6th August 2009) in the Bedford & Queens Road, and the Klondyke & Hawthorne Road areas of Bootle

RECOMMENDATION(S):

1. That Planning Committee & the Cabinet Member: Regeneration ask Cabinet to confirm that the existing planning framework is still appropriate and supportive of the Council's strategy for the HMRI area: and
2. That Cabinet confirms that the existing planning framework is still appropriate and supportive of the Council's strategy for the HMRI area.

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KEY DECISION: NO

FORWARD PLAN: NO

IMPLEMENTATION DATE: Following the end of the "call in" period.

ALTERNATIVE OPTIONS:

There are no alternative options. The Council needs to reaffirm and demonstrate that it has a sound and robust planning framework in place to support its agreed CPO action in the event of any Public Inquiry into the same.

IMPLICATIONS:

Budget/Policy Framework: None

Financial:

<u>CAPITAL EXPENDITURE</u>	2006/ 2007 £	2007/ 2008 £	2008/ 2009 £	2009/ 2010 £
Gross Increase in Capital Expenditure				
Funded by:				
Sefton Capital Resources				
Specific Capital Resources				
<u>REVENUE IMPLICATIONS</u>				
Gross Increase in Revenue Expenditure				
Funded by:				
Sefton funded Resources				
Funded from External Resources				
Does the External Funding have an expiry date? Y/N	When?			
How will the service be funded post expiry?				

Legal: The Director of Legal Services and Hill Dickinson have contributed to the preparation of this report.

Risk Assessment: This report is required with a view to preventing unnecessary delay, and to assist the consideration of the Council's planning framework at any required Public Inquiry into any Compulsory Purchase Orders that may be made pursuant to Minutes 83 and 84 of Cabinet on the 6th August 2009

Asset Management: N/A

CONSULTATION UNDERTAKEN/VIEWS

The HMRI Director, the Legal Services Director & Hill Dickinson have been consulted during the preparation of this report.

CORPORATE OBJECTIVE MONITORING:

<u>Corporate Objective</u>		<u>Positive Impact</u>	<u>Neutral Impact</u>	<u>Negative Impact</u>
1	Creating a Learning Community		√	
2	Creating Safe Communities	√		
3	Jobs and Prosperity		√	
4	Improving Health and Well-Being	√		
5	Environmental Sustainability	√		
6	Creating Inclusive Communities	√		
7	Improving the Quality of Council Services and Strengthening local Democracy		√	
8	Children and Young People	√		

LIST OF BACKGROUND PAPERS RELIED UPON IN THE PREPARATION OF THIS REPORT

1. The North West of England Plan – Regional Spatial Strategy to 2021, GONW, September 2008
2. Sefton Unitary Development Plan, Sefton Council, June 2006
3. South Sefton Housing Market Renewal: Klondyke & Canal Corridor SPG, July 2004
4. Klondyke & Canal Corridor Development Brief, November 2004 (as amended)
5. South Sefton Housing Market Renewal: Bedford Road / Queens Road SPG, July 2004
6. Bedford Road / Queens Road Development Brief, November 2004
7. Core Strategy leaflet prepared for Linacre & Derby workshop, June 2009
8. Sefton Strategic Housing Market Assessment, Fordham, June 2009
9. Draft Strategic Housing Land Availability Assessment, WYG, August 2009

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1. Background:

- 1.1 The report considered by the Cabinet Member: Regeneration & Cabinet in July / August 2009 set out, in Section 12, a statement of the planning position, which supported the proposals to make Compulsory Purchase Orders to acquire the remaining lands & interests in the areas known as Phase 3 of the Bedford Road / Queens Road area and Phase 1b of the Klondyke estate.
- 1.2 The report clearly set out how the current planning policy framework supported the proposals, it did not set out the detail of changes that have taken place nationally, regionally & locally since the local planning framework was prepared in 2003 - 2004. In the case of the national planning policy guidance, many of the Planning Policy Guidance notes (PPGs) and Planning Policy Statements (PPSs) have been replaced, whilst both the Regional Strategy and the Unitary Development Plan (UDP) were both still at a draft stage.
- 1.3 This report also considers how early work on the preparation of the Sefton Core Strategy will affect the planning framework, and whether the changes to the planning framework set out in this report have had any impact on human rights.

2. The planning policy framework

- 2.1 The planning policy framework set out in the previous report included:
 - National planning policy – Planning Policy Guidance notes (PPGs) and Planning Policy Statements (PPSs);
 - The Regional Strategy – the North West of England Plan
 - The adopted Unitary Development Plan (UDP), and supporting Supplementary Planning Guidance notes (SPGs) and Development Briefs.
- 2.2 The Regional Strategy and the UDP form the Council's Development Plan. Each lower level in the planning policy framework provides more specific and detailed guidance in relation to the 'Redevelopment Proposals', with the SPGs and Development Briefs providing the most detailed policy guidance relating to these areas.
 - a) National planning policy
- 2.3 Paragraph 12.1 of the report indicated that the redevelopment proposals were in line with national planning policy, and specifically referred to PPS1: Delivering Sustainable Development, PPS3: Housing, and PPG13: Transport.
- 2.4 PPS1 was replaced in January 2005. The PPS confirms Government's commitment to sustainable development, and the need for community engagement when preparing plans. The saved policies in the UDP, the SPGs and the Development Briefs for both the Klondyke and Bedford Road / Queens Road neighbourhoods (see paragraphs 2.12 – 2.21 below), are fully consistent with and fully support with these requirements.

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- 2.5 PPS3 was replaced in November 2006. The changes from the previous version largely reflect the recommendations of the Barker Review of Housing Supply (March 2004), and the Government's commitment to improving the affordability and supply of housing in all communities. In particular, authorities are required to have a rolling five-year supply of available and deliverable housing land at all times. The PPS also reinforces the Government's key housing policy goal is to ensure that everyone has the opportunity of living in a decent home, which they can afford, in a community where they want to live.
- 2.6 To achieve this, the Government is seeking to:
- achieve a wide choice of high quality homes, both affordable and market housing, to address the requirements of the community.
 - widen opportunities for home ownership and ensure high quality housing for those who cannot afford market housing, in particular those who are vulnerable or in need.
 - improve affordability across the housing market, including by increasing the supply of housing.
 - create sustainable, inclusive, mixed communities in all areas, both urban and rural.
- 2.5 These housing policy objectives provide the context for planning for housing through development plans and planning decisions. The specific outcomes that the planning system should deliver are:
- High quality housing that is well-designed and built to a high standard.
 - A mix of housing, both market and affordable, particularly in terms of tenure and price, to support a wide variety of households in all areas, both urban and rural.
 - A sufficient quantity of housing taking into account need and demand and seeking to improve choice.
 - Housing developments in suitable locations, which offer a good range of community facilities and with good access to jobs, key services and infrastructure.
 - A flexible, responsive supply of land – managed in a way that makes efficient and effective use of land, including re-use of previously-developed land, where appropriate.
- 2.6 The saved policies in the UDP, the SPGs and the Development Briefs for both neighbourhoods (see paragraphs 2.12 – 2.21 below), fully support with these requirements.
- 2.7 PPG13 had not been updated since it was published in April 2001, and thus the policy framework provided by this statement of government policy has not changed and has no implications on the documents in our planning policy framework.

b) Regional planning policy

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- 2.8 At the time the UDP, the SPGs and the Development Briefs for these neighbourhoods were prepared, the North West of England Plan (Regional Strategy to 2021) was still at the draft stage. It was published in September 2008.
- 2.9 Paragraphs 12.2 – 12.5 of the previous committee report set out the key policies relating to Sefton’s proposals in the HMRI neighbourhood. Specifically, Policies LCR1 ‘Liverpool City Region Priorities’ & LCR2 ‘The regional centre & inner areas of the Liverpool City Region’ confirm that new residential development should be focused on the HMRI area in order to secure a significant increase in population and to support major regeneration activity.
- 2.10 The saved policies in the UDP, the SPGs and the Development Briefs for both neighbourhoods (see paragraphs 2.12 – 2.21 below), fully support with these requirements.

c) Sefton’s planning policy framework

- 2.11 In Sefton, the planning policy framework supporting the Council’s proposals in the HMRI area comprise policies in the ‘saved’ UDP, as well as area-specific SPGs and Development Briefs that were adopted under the ‘old’ (pre-2004) planning system. Work has commenced on preparing our Core Strategy as the first document in our Local Development Framework (LDF).

(i) The UDP

- 2.12 The UDP was adopted on 29th June, 2006. By letter dated 15th April, 2009 the Government Office for the North West has confirmed that, with the exception of 4 polices that are not relevant to the ‘Redevelopment Proposals’, paragraph 1(2)(a) of Schedule 8 to the Planning & Compensation Act 2004 does not apply, and the UDP policies are saved until they are replaced by polices in the Local Development Framework (i.e. the Core Strategy and other Local Development Documents).
- 2.13 The UDP contains 3 polices that relate specifically to the HMRI area. Objections were received to these policies in the draft UDP, and these were heard by the Planning Inspector who conducted an inquiry into objections to the UDP during 2004. She concluded in paragraph 13 of her covering letter that “I have generally found the Sefton Unitary Development Plan Review to be comprehensive, well thought out and sensitive to the key issues relevant to the Borough, particularly that of urban renewal, especially within the Pathfinder Area”.
- 2.14 Although a number of minor changes were made to the policies and their supporting text as a result of her recommendations, the substance of the policies remains intact and is still valid and relevant today.
- 2.15 The substance of policies H7 & H8 was summarised in paragraphs 12.8 & 12.9 of the committee report considered in July / August (Minutes 83 & 84).

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- 2.16 In addition to the UDP, Supplementary Planning Guidance notes (SPGs) were prepared for both the Bedford Road / Queens Road & Klondyke neighbourhoods. These were adopted in July 2004 following full public consultation. The SPGs identify where redevelopment will take place and where new housing will be built, as well as the framework for all the other supporting uses needed to rejuvenate the area.
- 2.17 Although the timescales envisaged for the implementation of the redevelopment has slipped for a variety of reasons, including the availability of funding, and a number of the detailed requirements have been superseded, the proposals to redevelop areas of obsolete housing and to create modern homes to meet local needs and diversify the housing offer in south Sefton are still valid, and the Council is still committed to completing these proposals in order to complete the regeneration of both areas.
- 2.18 The SPGs were supported by Development Briefs which provided greater detail about the proposals for each neighbourhood. Although design standards have changed (for example Eco Homes standards have been largely superseded by the Code for Sustainable Homes), the basic design principles contained in the Development Brief remain equally valid today.
- 2.19 A key area where policies have evolved since 2004 is in respect to the provision of affordable housing. The adopted UDP indicated that, as a result of the 2005 Housing Needs Survey, the demand for affordable housing in Sefton had doubled since the 2003 Study, and that the Council should seek 89% of the affordable housing provision to be in the social rented sector, with the remaining 11% intermediate housing as defined in Annex B of PPS3.
- 2.20 In November 2008, Cabinet reviewed the provision of affordable housing as part of a report reviewing the implications of relaxing the housing restraint policy (Policy H3 of the UDP) as a result of the adoption of the Regional Strategy in September 2008. The Annex to this report confirmed that the threshold for requiring affordable housing should apply to all sites creating a minimum of 15 additional dwellings (net) in accordance with PPS3, and that the split between social rented and intermediate housing should be amended to 80% social rented housing and 20% intermediate housing, subject to this being economically viable on any site. These requirements have superseded the requirements for affordable housing set out in the SPG and the Development Briefs.
- 2.21 The Council also produced an Interim Planning Guidance (IPG) for new housing in south Sefton in August 2007. Whilst its requirements for affordable housing provision were superseded by the November 2008 committee report referred to above, Section 3, 4 & 5 of the IPG relating to house type and size, design requirements and Section 106 and other planning requirements are still relevant and update the requirements of the SPG and Development Briefs relating to these matters.

(ii) The Core Strategy

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- 2.22 Work commenced on preparing the Council's Core Strategy in January 2009 although a number of studies were commissioned before this date to provide the evidence base. The majority of these are now nearing completion. None has indicated that any fundamental change is needed to the current planning policy framework in the HMRI area.
- 2.23 Specifically, the Strategic Housing Market Assessment, which took account of the impact of the credit crunch on people's ability and aspirations to move home, recognised that the housing sub-market in Bootle and Netherton is different to that in the rest of Sefton, both in terms of its affordable housing need and the size and type of new homes that are required to meet locally generated needs.
- 2.24 Similarly, the early consultation carried out during the preparation of the Core Strategy (which was reported to Planning Committee and Cabinet in August / September 2009), has not suggested that any fundamental change is needed to the current planning policy framework in the HMRI area.
- 2.25 Although the levels of funding and the funding bodies that support intervention under the Housing Market Renewal Initiative may change, this does not affect the geography of the area or the need for intervention.

3. Human Rights Act 1998

- 3.1 The Human Rights Act 1998 places direct obligations on public bodies such as the Council to demonstrate that the use of its powers is in the public interest, and the use of such powers is proportionate to the ends being pursued.
- 3.2 The new planning system which was introduced as a result of the Planning & Compensation Act 2004, with PPS12 'Local Development Frameworks' produced by the Government (Department of Communities and Local Government) to set out what Development Plan Documents should be produced under this new system.
- 3.3 The original PPS12 was replaced by PPS12 'Local Spatial Planning' in June 2008. The Impact Assessment prepared in connection with this replacement PPS included a checklist of specific impact tests against which the PPS was assessed. This concluded, inter alia, that "these proposals will not have a negative impact on human rights. The proposals are in accordance with the Human Rights Legislation".

4. Conclusions

- 4.1 The planning framework remains fundamentally the same as when the Housing Market Renewal Initiative was launched in 2003. Whilst there have been changes, both to the planning system, and to social, economic and environmental conditions since the programme began, this has not materially affected either the need for and the priority for action in the two intervention

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areas. Whilst the conditions of housing market failure may have changed, the need for renewal has not altered, as there still remain issues of housing market failure to address. The HMRI programme and the planning framework provide essential continuity to securing the regeneration of these parts of Bootle.

- 4.2 The planning framework has been proven and endorsed, both during the inquiry into objections into the UDP in 2004, and the two CPO inquiries held during 2006. The key planning policy documents produced in 2004 still constitute a robust framework which supports continued intervention in these two neighbourhoods.
- 4.3 Where required, the need for change has been approved by the Council. This has included the report to Cabinet on the need for affordable housing resulting from changes to the regional Strategy and updated evidence, as well as the Interim Planning Guidance for new housing in south Sefton which updates the design requirements that new housing should meet. But neither of these updates has amended the principles behind the need for intervention in the Klondyke and Bedford Road / Queens Road neighbourhoods, as set out in the UDP, and the SPGs and Development Briefs for each area.

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REPORT TO: REGENERATION CABINET:
LEISURE AND TOURISM CABINET:

DATE: 16 December 2009 Regeneration Cabinet
6 January 2010 Leisure and Tourism Cabinet

SUBJECT: SUSTAIN– Interreg IVC programme

WARDS ALL
AFFECTED:

REPORT OF: Andy Wallis, Planning and Economic Regeneration Director
Graham Bayliss, Leisure Services Director

CONTACT OFFICER: Andrew Hall
Tel: 0151 934 3604
andrew.hall@planning.sefton.gov.uk

Dave McAleavy
Tel:0151 934 2961
Dave.McAleavy@leisure.sefton.gov.uk

EXEMPT/ CONFIDENTIAL: No

PURPOSE/SUMMARY:

To explain and update members on the current situation in respect of 'SUSTAIN' project for the Interreg IVC programme, in which Sefton, working with the North West Coastal Forum, are cooperating with transnational partners, as leaders in the field of coastal management. This will provide Sefton and its regional partners improved capability to look after our coastal asset and maintain Sefton's role as a leading coastal authority.

The aim of SUSTAIN is to have in place, at the end of three years, an implementable sustainability policy tool, applicable for all 22 coastal states of the EU, which will support sustainable integrated management of coastal issues.

This project in its current form, was brought to the Regeneration Cabinet on the 21st January 2009 and Sefton's participation subsequently approved. The Council has now received notification from the Dutch Lead partner that SUSTAIN has been approved.

The budget estimate is based on Sefton holding the final meeting, an international conference of around 150 delegates, in 2012 which would showcase the SUSTAIN project results. This is intended to be in Southport.

Cabinet Member for Regeneration approved Sefton's continued participation in the

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Interreg IVC programme and authorised the Director for Planning and Economic Regeneration to re-confirm participation with the Dutch lead partner co-ordinating the submission. The recommendation to waive the contract procedure rules in respect of the working relationship with the North West Coastal Forum's Regional Coastal Project Officer (the secretariat officer) due to the special circumstance contained within that report was approved.

REASON WHY DECISION REQUIRED:

To update the Cabinet Member and confirm that the Interreg IVC proposal called 'SUSTAIN' has now been approved.

RECOMMENDATION(S):

- i) The Cabinet Member is asked to note that the Interreg IVC proposal called 'SUSTAIN' has now been approved and is scheduled to commence in January 2010.

KEY DECISION: No

FORWARD PLAN: No

IMPLEMENTATION DATE: Following the call in period for the minutes of this meeting.

ALTERNATIVE OPTIONS: Not to participate in this follow on project, but this has previously been agreed.

IMPLICATIONS:

Budget/Policy Framework:

Financial: The financial implication for Sefton is a commitment to provide in-kind staff. This is likely to involve officers from several Departments. The maximum value would be £24,290 over four financial years

The NWCF will provide £3,536 of staff time match towards the local funding requirement.

	2009/ 2010 £	2010/ 2011 £	2011/ 2012 £	2012/ 2013 £
<u>CAPITAL EXPENDITURE</u>				
Gross Increase in Capital Expenditure				
Funded by:				

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Sefton Capital Resources				
Specific Capital Resources				
<u>REVENUE IMPLICATIONS</u>				
Gross Increase in Revenue Expenditure				
Funded by:				
Sefton funded Resources (In-kind)	1,290	6,000	6,000	11,000
Funded from External Resources				
Does the External Funding have an expiry date? Y/N	Dec 2012			
How will the service be funded post expiry?	N/A as project ends			

Legal:

Risk Assessment: A risk would be if the voluntary agency North West Coastal Forum could not continue during the life of the project. The remainder of the project would be assumed by lead officers within the Council.

Asset Management: N/A

CONSULTATION UNDERTAKEN/VIEWS

Senior officers from Planning and Economic Regeneration, Tourism, and Leisure have all been consulted on the drafting of this report. Environmental protection have been consulted.

FD252 - The Finance and Information Services Director has been consulted and his comments have been incorporated into this report.

CORPORATE OBJECTIVE MONITORING:

<u>Corporate Objective</u>		<u>Positive Impact</u>	<u>Neutral Impact</u>	<u>Negative Impact</u>
1	Creating a Learning Community	✓		
2	Creating Safe Communities		✓	
3	Jobs and Prosperity	✓		
4	Improving Health and Well-Being	✓		
5	Environmental Sustainability	✓		
6	Creating Inclusive Communities		✓	
7	Improving the Quality of Council Services and Strengthening local	✓		

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	Democracy			
8	Children and Young People		✓	

LIST OF BACKGROUND PAPERS RELIED UPON IN THE PREPARATION OF THIS REPORT
None

Background

Interreg IVC Project: SUSTAIN:

- 1) Interreg is a European Union Structural Fund aimed at achieving interregional cooperation between defined EU regions.

Proposal

- 2) If given approval for Interreg IVC project 'Sustain', it will be led by the Dutch Partner EUCC and involve 13 partners (see list attached), all with direct interest and experience in coastal management.
- 3) The key objective of SUSTAIN is to have in place, at the end of three years, a policy tool, applicable for all 22 coastal states of the EU, which will ensure that the integrated management of coastal issues will be sustainable. This entails the acceptance, within the project, of a set of criteria which are readily measurable and which cover both the threats of unsustainable development and the opportunities provided by a sustainable future, which faces all coastal authorities and communities throughout Europe.
- 4) SUSTAIN will provide a new way of thinking about sustainable management through the development of a unique set of indicators which incorporate objective quality information and targets related to key aspects of the EU Sustainable Development Strategy viz. nature and biodiversity, carrying capacity, water & environmental quality, climate change and socio-economic aspects. They will be different from the current state-of-the-coast indicators, which inadequately try and measure sustainability at present. They will have been designed specifically with sustainability objectives in mind rather than simply looking at the present status of a wide range of different parameters some of which are related to sustainability but most are not. It will be achieved whilst maintaining continuous improvement of quality of life along the coastline both for current and for future generations by enabling coastal communities to manage and use their resources efficiently.
- 5) The expected results are:

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- Informed local/regional authorities, relevant stakeholders and general public,
 - A coherent, sustainable policy driven management tool
 - Partners with increased knowledge of sustainability through exchange of experience
 - A set of criteria agreed and implementable at local and regional partner authority level
 - Contribution to the implementation of the renewed EU Sustainable Development Strategy and related policies e.g. ICZM, Water Framework Directive (WFD), Maritime Policy and others at local and regional level
 - A major international coastal conference organised by Sefton to be held in the region in 2012, raising the profile of Sefton's role as a leading coastal local authority
- 6) The project is planned to run for 3 years (2010-12). It involves exchange visits and relevant workshops organised by the different partners to develop and assess the specific sustainability criteria. Also web-based communications will be developed as part of the project and include on completion of the project a sustainability improvement Guide for Authorities, an Implementation Guide for Authorities, a report on the Exchange of Experience and a report on the partner assessments of the sustainability criteria all of which will be packaged with all details of the SUSTAIN project in a special DVD dissemination package including a final project report.
- 7) Greater use will be made of teleconferences as part of this project and the communication component of the project will disseminate information from the workshops and exchange visits. Project costs are therefore limited to workshop organisation, travel costs on exchanges, and dissemination of information.
- 8) Sefton is a member of the North West Coastal Forum (NWCF), hosted by the 4NW the Regional Leaders Forum, and as the NWCF is not recognised as a 'legal entity' by the Secretariat under Interreg regulations. Sefton will act as the participating partner, but will subcontract work direct to the NWCF to ensure the regional input necessary.
- 9) The total cost of participation has been estimated at around €122,432 (approximately £111,302) over the three years of the project 2009-12. The intervention rate is 75%; the maximum local funding required is therefore £27,826. This is made up of in-kind (mainly staff time) from the NWCF and the Council. The NWCF have had authority to continue its participation.
- 10) No additional resources are required. NWCF costs will be paid by Sefton against invoices, and claims will then be submitted by Sefton to the project lead partner. These arrangements are the same as for the

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earlier Interreg IIC project. An audit fee has been built into the project costs to account for local financial monitoring requirements.

- 11) The budget estimate is based on Sefton holding the final meeting. This would involve an international conference of around 150 delegates, in 2012, expected to be Southport, which would showcase the SUSTAIN project results. Sefton and the North West Coastal Forum will participate in all visits and exchanges. We have been invited to lead Component 2, communications.
- 12) There are 6 partners from the earlier CoPraNet project and 7 new partners. The partnership includes 3 new Member States, listed below.

Baltic

- Baltic Energy Forum, Denmark

Black Sea

- Union of Bulgarian Black Sea Local Authorities, Bulgaria

N Atlantic seaboard

- EUCC - The Coastal and Marine Union, Netherlands (*lead partner and lead Component 1: Management & Co-ordination*)
- Sefton Metropolitan Borough Council, UK (*lead Component 2: Communication & Dissemination*)
- Coastal and Marine Resources Centre, University College Cork, Ireland
- Down District Council, UK

S Atlantic seaboard

- Canary Institute of Marine Science – Canary Islands Regional Govt., Spain
- Regional Commission for the development of the Lisbon Region and Tejo Valley, Portugal (*lead Component 3: Exchange of experiences dedicated to the identification and analysis of good practices*)

Mediterranean

- Samothraki Municipality, Greece
- Kouklia Community Council, Cyprus
- Regional Development Centre Koper, Slovenia
- Teramo Province, Italy
- Marine Observatory / Public Association of 'Communes' of the Littoral of Maures, France

Recommendations:

- i) The Cabinet Member is asked to note that the Interreg IVC proposal called 'SUSTAIN' has now been approved and is scheduled to commence in January 2010.

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REPORT TO: CABINET MEMBER - REGENERATION

DATE: 16TH DECEMBER 2009

SUBJECT: LOCAL ECONOMIC ASSESSMENT

WARDS AFFECTED: ALL WARDS

REPORT OF: ANDY WALLIS (PLANNING & ECONOMIC REGENERATION DIRECTOR)

CONTACT OFFICER: MARK LONG (x3471)

EXEMPT/ CONFIDENTIAL: NO

PURPOSE/SUMMARY:

To introduce the new statutory duty to undertake a Local Economic Assessment to members, and explain preparations for implementing Assessments in the North West, Merseyside and Sefton.

REASON WHY DECISION REQUIRED:

Compliance with a new statutory duty under the Local Democracy, Economic Development and Construction Act 2009.

RECOMMENDATION(S):

- (i) That members note the report
- (ii) That the Planning & Economic Regeneration Director report back on plans for the preparation of the Sefton Local Economic Assessment, and any financial implications
- (iii) That in principle agreement is given to the preparation of a Sustainable Economic Development Strategy.

KEY DECISION: No

FORWARD PLAN: N/a

IMPLEMENTATION DATE: After expiry of call-in period.

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ALTERNATIVE OPTIONS:

None – this is a statutory duty.

IMPLICATIONS:

Budget/Policy Framework: No budget currently exists to pay for the completion of a Local Economic Assessment. However Members will be informed once costs and funding are determined.

Financial: The costs and funding for the development of the Local Economic Assessment are, as yet, not known. Some DCLG funding is expected to be ring fenced to Local Authorities in 2010/11 to assist with this work. A further report outlining both the costs of the work and funding available will therefore be brought back to this Committee at a future date.

<u>CAPITAL EXPENDITURE</u>	2009/ 2010 £	2010/ 2011 £	2011/ 2012 £	2012/ 2013 £
Gross Increase in Capital Expenditure				
Funded by:				
Sefton Capital Resources				
Specific Capital Resources				
<u>REVENUE IMPLICATIONS</u>				
Gross Increase in Revenue Expenditure				
Funded by:				
Sefton funded Resources				
Funded from External Resources				
Does the External Funding have an expiry date? Y/N	When?			
How will the service be funded post expiry?				

Legal: tbc

Risk Assessment: N/a

Asset Management: N/a

CONSULTATION UNDERTAKEN/VIEWS

FD253 – the Finance Department and its Director has been consulted and his comments have been incorporated into this report.

CORPORATE OBJECTIVE MONITORING:

<u>Corporate Objective</u>		<u>Positive Impact</u>	<u>Neutral Impact</u>	<u>Negative Impact</u>
1	Creating a Learning Community		✓	
2	Creating Safe Communities		✓	
3	Jobs and Prosperity	✓		
4	Improving Health and Well-Being		✓	
5	Environmental Sustainability		✓	
6	Creating Inclusive Communities		✓	
7	Improving the Quality of Council Services and Strengthening local Democracy	✓		
8	Children and Young People		✓	

LIST OF BACKGROUND PAPERS RELIED UPON IN THE PREPARATION OF THIS REPORT

DCLG (2009), Local Economic Assessments: Draft Statutory Guidance

Improvement & Development Agency (2009), How to do a Local Economic Assessment

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Introduction

1. On 13th November 2009, the Local Democracy, Economic Development and Construction Bill received the Royal Assent.
2. The Act creates a requirement for local authorities to undertake a Local Economic Assessment (LEA) of their area. The Assessment is designed to improve their understanding of the local economy, and contribute to the development of local and regional economic strategy.
3. The rest of this report summarises the duty on local authorities, and explains what is included in the scope of an economic assessment. It goes on to describe how the duty is being implemented in the North West and Liverpool City Region, and makes recommendations for the development of a Local Economic Assessment by Sefton Council.

The Draft Statutory Guidance

4. Now that the legislation is enacted, the government intends to consult formally on statutory guidance. However, draft statutory guidance was issued in August 2009, and this gives us the best insight into how government sees the LEA working in practice.
5. The four core objectives of an LEA (DCLG 2009 para 4.3) are to:
 - Provide a sound understanding of the economic conditions in the area, and how they will affect residents and businesses
 - Identify the comparative strengths and weaknesses of the local economy, and the nature and form of local economic challenges and opportunities
 - Identify the local economic geography, including the economic linkages between the area being assessed and the wider economy
 - Identify the local constraints to economic growth and employment, and the risks to delivering sustainable economic growth.
6. The guidance says the assessment should cover a set of themes (there are no prescribed indicators), including business and enterprise, people and communities, and sustainable economic growth. It also says the assessment should reflect “real economic geographies” i.e. real units such as travel-to-work areas or retail catchment areas, rather than administrative boundaries of the local authority.
7. The primary purpose of local economic assessments should be to “inform... councils’ sustainable community strategies. This in turn will inform their LAAs and, where appropriate, any subsequent LAA revision proposals and the economic interventions of LSPs” (para 7.2).
8. LEAs are also intended to inform a variety of other local strategies and plans:

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- ❑ Local Development Frameworks (as part of the evidence base on employment land etc)
 - ❑ Local Transport Plans
 - ❑ City Regional strategies
 - ❑ Housing Strategies
 - ❑ Work & Skills Plans
 - ❑ Local authority commissioning for 16-19 learning
 - ❑ Child Poverty plans
 - ❑ Future rounds of CAA (LEA as risk assessment).
9. Critically, the guidance expects LEAs to contribute to the evidence base for Integrated Regional Strategies (IRS) and accompanying Implementation Plans. The Regional Development Agency and its local authorities must enter into a “structured regional dialogue” (para .4) to ensure a core evidence base common to all LEAs. As a result, the LEA evidence base may be tested in the IRS Examination in Public.
10. In preparing an Assessment, the local authority should consult those organisations it considers appropriate, similar to the duty of consultation the Council has with regards to the Local Area Agreement.
11. Local authorities should aim to complete their first assessment within 6 to 9 months of the duty coming into effect i.e. by December 2010. There is no fixed start date, but DCLG is encouraging an immediate start on planning and LEA management. There is no fixed review cycle, but a local authority may revise an assessment, or any part of it, at any time. DCLG has suggested a full baseline assessment to start with, a “light touch” review each year, and a full review every three years.
12. DCLG has indicated that a grant will be paid into local authorities’ Area Based Grant to support the additional costs of preparing an LEA. The Council will, of course, be able to top up this grant with other resources if the total costs of the LEA exceed the DCLG allocation.

Comments

13. Central government has been saying for some years that it wishes to see a progressively greater devolution of powers and responsibilities to lower levels of government. However, ministers have also been concerned at the preparedness of local authorities to receive these powers. The purpose of the duty to prepare assessments is therefore to build confidence in both local and central government that it is safe to invest in devolved structures – in particular, that local authorities have a well-informed view of their local economy before investing scarce public resources.
14. For areas like Merseyside this presents little difficulty because economic regeneration has been a sustained priority over several decades, and many economic assessments have been prepared in that time to guide our regeneration investments. Sefton Council has often assembled a strong

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evidence basis in support of major bids for funding (e.g. Atlantic Gateway SIA), or to guide partners' engagement with a priority area (e.g. Southport Investment Strategy).

15. However, the creation of a statutory duty will take the need for a strong evidence base out of the timescales imposed by funders and place it on a firm footing within the corporate planning cycle of the Council. We welcome the mainstreaming of economic assessment within the Council's capacity to "know and understand its communities", which as we know is a key line of enquiry for the Comprehensive Area Assessment.
16. Members should bear in mind that, although preparing an assessment is a statutory duty, preparing a plan or acting on the assessment are not. As a discretionary activity, local economic development has taken many different forms depending on need, opportunity, priorities and available resources. Sefton has for many years taken a strategic and robust approach to regeneration. The level of worklessness on Merseyside, and the size of the productivity gap with the rest of the country, justify a continuing flow of external resources to rectify the city region's weaknesses. Economic assessments are therefore an essential tool to spend public money wisely and effectively.

Implementing the Local Economic Assessment in the North West and in Liverpool City Region

17. The Regional Leaders Board (4NW) issued a draft Regional Framework for Statutory Local Economic Assessments in November 2009.
18. This is a "light touch" guidance document with the aim of setting some basic parameters for the production of LEAs to allow benchmarking and comparisons across the North West – also, to ensure consistency when LEAs are used to inform the Integrated Regional Strategy (RS2010).
19. The Regional Framework encourages collaboration within each of its five sub-regions, as the most practical way of aligning the LEAs with real economic geographies. However, it recognises the Economic Assessments will need to show awareness of adjacent sub-regions.
20. 4NW ask that all LEAs are completed by September 2010, in line with the agreed timetable for submission of Parts 1 & 2 of the Regional Strategy to be submitted to the Examination in Public Panel in November 2010.
21. Regional support for local authorities will include:
 - Regional Intelligence Unit of the NWDA
 - Regional Statisticians of the Office for National Statistics
 - North West Improvement and Efficiency Partnership (via its Economy Commission)
22. The Liverpool City Region Leaders & Chief Executives have asked The Mersey Partnership to co-ordinate the production of a single City Region Economic

Assessment with local perspectives picked up by sections on specific themes and localities. TMP has set up a working party of local authority officers to take this forward, on which Sefton is represented. The working party has replied to a consultation from 4NW on suggested core indicators for North West LEAs. TMP has also proposed that the City Region Economic Assessment should be overseen by an Independent Commission for the Liverpool City Region Economy to ensure private sector input.

23. In the longer-term, the Merseyside Multi-Area Agreement (signed off in September 2009) says that partners would like the proposed Economy Board to lead the preparation of future economic assessments for the City Region, but how this would work in practice has not yet been discussed or decided.

Comments

23. The statutory duty has been placed on local authorities and it is for the local authorities concerned to make final decisions on the purpose, delivery and use of their assessments.
24. However, it is entirely reasonable to take account of the “real economic geography” of Sefton in setting the limits to its assessment, and in its choice of research partners:
 - ❑ Sefton has an obvious link with Liverpool because of travel-to-work flows. We need a cross-border analysis of the south Sefton/north Liverpool area, building on the current Strategic Regeneration Framework study.
 - ❑ Sefton also has an important connection to Ormskirk, West Lancashire and the Preston City Region area. Within the Liverpool City Region, Sefton has offered to act as “friend at court” for West Lancashire Council. In terms of “real economic geographies”, it would be desirable for West Lancashire to be included within the spatial boundary of the City Region LEA so these real economic relationships are properly addressed.
25. We already have some experience of monitoring the city regional economy through the Merseyside Economic Review, now in its 9th year. While this is a good platform for comparing Liverpool City Region with other city regions and the UK as a whole, it lacks detail of assets, threats, opportunities and linkages within the city region itself. There is a definite gap in understanding which could be usefully filled by a tier of local assessments.
26. The challenge will be how to fit together the top-down vision of TMP with the bottom-up vision of the local authorities. Although this has yet to be resolved in detail, it is clear that both TMP and the local authorities need a strategic agreement on a framework for data collection, interpretation and reporting. Work on defining these key questions is ongoing and will be reported back to members.

Implementing the Local Economic Assessment in Sefton

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27. The Local Economic Assessment is one of a family of assessments that Sefton is (or will be) responsible for. The others include:
 1. Worklessness assessment – All local authorities bidding for Future Jobs Fund (Sefton is included in the successful City Employment Strategy bid) must carry out a worklessness assessment and prepare a Work and Skills Plan by April 2010. This was announced in the government’s response to the Houghton review “Tackling Worklessness”.
 2. Child poverty assessment – Section 21 of the Child Poverty Bill will place a duty on local authorities to work with partners to prepare an assessment of the needs of children living in poverty in their area.
 3. Local Development Framework Core Strategy evidence base – Planning Policy Statement 12 requires spatial policy to be founded on a robust and credible evidence base, based on the views of the local community and others who have a stake in the future of the area. For example, the Employment Land and Premises Study was commissioned by a group of local authorities including Sefton, and forecasts demand and supply for business accommodation.
 4. “State of the Borough” Core Evidence Report – following the review of Sefton’s governance, a core evidence base has been assembled to enhance the LSP’s strategic understanding of local communities. This work will inform the LSP’s “Sefton Informed” group, and the Council’s “Knowing and Understanding Your Communities Working Group”.
 5. Joint Strategic Needs Assessment – “Better Life, Better Health”, was undertaken in partnership between Sefton Council and Sefton PCT and published in March 2008. It summarised Sefton’s local health needs and generated insights into local health inequalities.
28. There is a clear and pressing need to ensure that the different assessments are joined up and consistent. It is also important that they mutually support each other and tell the same “story of place”. This can best be achieved if the LEA is prepared in partnership between the Council, its LSP partners, and TMP, with the Council ultimately responsible for approving its preparation and quality.
29. To deliver the assessment, the following internal arrangements are recommended.
30. The lead member for the assessment is the Cabinet Member for Regeneration. His role is to:
 - Keep check on the progress of the LEA, working closely with the lead officer
 - Maintain relationships with neighbouring local authorities (inside and outside the City Region) to ensure all relevant relationships are taken into account
 - Unblock internal obstacles to progress.
31. Within Sefton Borough Partnership, the Cabinet Member – Regeneration chairs the Economic Development & Sustainability Thematic Group, so it is convenient

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for that group to co-ordinate the SBP's input to the Local Economic Assessment.

32. Senior management responsibility for the Local Economic Assessment in Sefton rests with the Planning & Economic Regeneration Director. His role is to:
- ❑ Prepare a project plan for Sefton's input to the assessment, underpinning the City Region Economic Assessment work plan as a whole
 - ❑ Secure support for the assessment from internal and external stakeholders
 - ❑ Lead on the commissioning of local information and analysis, whether in-house or external
 - ❑ Keep members informed.
33. PERD will convene (i) a Steering Group of key officers to supervise the study, and (ii) a Stakeholder Panel to advise and support the Steering Group. We anticipate needing the following range of support internally and externally:

Local Authority	Partners
Adult Social Care	Business Link NW
Children, Schools & Families	Confederation of Social
Community Safety	Entrepreneurs
Corporate Policy & Performance	Environment Agency/Natural
Corporate Procurement	England
Environmental Protection	Federation of Small Businesses
Leisure	Jobcentre Plus
Neighbourhoods & Housing	Knowsley MBC
Renewal	Liverpool CC
Planning & Economic Regeneration	LSC
Technical Services	Merseytravel
Tourism	NWDA
Transportation	Sefton Chamber of Commerce & Industry
	Sefton PCT
	St Helens MBC
	The Mersey Partnership
	West Lancashire DC
	Wirral MBC

34. The exact scope, phasing and cost of the study will be worked up by the LEA Steering Group, and reported to subsequent meetings of Cabinet Member – Regeneration.

Comments

35. The duty is fulfilled by the preparation of an assessment. However, the Council and its partners will want to apply that understanding and insight to their plans for economic improvement.

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36. To guide those plans, to embrace responses to the recession, and to embed carbon reduction in everything we do, it is recommended that the Council commits itself to preparing a Sustainable Economic Development Strategy by the end of 2010/11.
37. The new Strategy will inform the Sustainable Community Strategy, generate priorities for any future Local Area Agreement, attract new funding, guide the development of strategic programmes and key projects, and lay the foundations for our wider corporate objective of increasing social, economic and environmental well-being. It will also show how Sefton is delivering the Integrated Regional Strategy and maximising its potential within the City Region.

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REPORT TO: Cabinet Member – Technical
Cabinet Member – Environmental
Cabinet Member - Regeneration
Cabinet

DATE: 2nd December 2009
16th December 2009
16th December 2009
17th December 2009

SUBJECT: Potential Funding Opportunity 1- Energy Efficiency & Renewable Energies in Social & Low Income Housing

WARDS AFFECTED: Mostly South Sefton

REPORT OF: Alan Moore, Deputy Chief Executive and Strategic Director
Andy Wallis – Planning and Economic Regeneration Director

CONTACT OFFICER: Mo Kundi X3447

**EXEMPT/
CONFIDENTIAL:** No

PURPOSE/SUMMARY:

To inform Members of the resources being made available under the North West Operational Plan for improving energy efficiency and the installation of renewable energies in social and low income housing in Merseyside, and to seek Members' views on Sefton Council being the accountable body for a sub-regional project.

REASON WHY DECISION REQUIRED:

For Sefton to take on the financial and legal responsibility of being an accountable body for a sub-region project requires Cabinet approval.

RECOMMENDATION(S):

That Cabinet Members for Technical, Environmental and Regeneration:-

1. Note the report, and that the

Cabinet:-

2. Note the Expression of Interest submitted to North West Regional Authority, and
3. Support the principle of Sefton Council being the accountable body for this sub-regional bid, subject sufficient external funding being made available for the management of the project, and Cabinet approval.

KEY DECISION: No

FORWARD PLAN: No

IMPLEMENTATION DATE: After the call in period

ALTERNATIVE OPTIONS:

Some legislation is already in place, and more is planned, which will impose statutory duty on local authorities to take action to address the adverse impact of climate change. By

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taking advantage of the ERDF funding being made available, and being an accountable body for the sub-region project provides a unique opportunity to progress both the climate reductions, and low carbon economy agenda.

IMPLICATIONS:

Budget/Policy Framework:

Financial: There are no direct financial implications as a result of this report.

<u>CAPITAL EXPENDITURE</u>	2006/ 2007 £	2007/ 2008 £	2008/ 2009 £	2009/ 2010 £
Gross Increase in Capital Expenditure				
Funded by:				
Sefton Capital Resources				
Specific Capital Resources				
<u>REVENUE IMPLICATIONS</u>				
Gross Increase in Revenue Expenditure				
Funded by:				
Sefton funded Resources				
Funded from External Resources				
Does the External Funding have an expiry date? Y/N	When?			
How will the service be funded post expiry?				

Legal: N/A

Risk Assessment: N/A

Asset Management: N/A

CONSULTATION UNDERTAKEN/VIEWS

Technical Services
Environmental Services
Leisure and Tourism
Legal
Finance

CORPORATE OBJECTIVE MONITORING:

<u>Corporate Objective</u>		<u>Positive Impact</u>	<u>Neutral Impact</u>	<u>Negative Impact</u>
1	Creating a Learning Community	/		
2	Creating Safe Communities	/		
3	Jobs and Prosperity	/		

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4	Improving Health and Well-Being	/		
5	Environmental Sustainability	/		
6	Creating Inclusive Communities	/		
7	Improving the Quality of Council Services and Strengthening local Democracy	/		
8	Children and Young People	/		

LIST OF BACKGROUND PAPERS RELIED UPON IN THE PREPARATION OF THIS REPORT Report to Leaders Group meeting on 19 th November 2009

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1.0 Background

- 1.1 Members may be aware of a report entitled 'The Development Low Carbon Economy in response to Climate Change, being presented to Cabinet Member Environment (18th November 2009), Cabinet Member Technical Services (18th November 2009), Cabinet Member Regeneration (23rd November 2009), and the Cabinet on 25th November 2009.
- 1.2 The report sets out the various national climate change legislation and regulations that will impose statutory duties and obligations on local authorities to tackle climate change by introducing low carbon policies and practices in housing, transport, regeneration, environmental protection, planning and other key services. Local authorities are also expected to play an important role in raising awareness and influencing change more widely by working with its partners and stakeholders.
- 1.3 The UK Government is committed to reducing carbon emissions by 34% on 1990 levels by 2020, and 80% by 2050.
- 1.4 Reference was also made in the Cabinet report that carbon reduction commitment must lead to a reduction in CO₂ from buildings within the Council, workplaces, and the domestic housing stock across social and private rented sectors plus owner occupied. Energy efficiency measures will be extremely important as they can account for up to 40% of the required CO₂ reduction targets.
- 1.5 Central Government has recognised this and is currently making available £7 billion between 2008-11 through the following energy efficiency programmes:-
 - Energy supplier/generator obligations of the Carbon Emissions Reduction Target (£2.8 billion)
 - Community Energy Saving Programme (CESP) (£350 million)
 - Additional Energy Efficiency Obligation (£560 million)
 - Warm Front (£874 million)
 - Decent Homes (£2.2 billion)
 - Social Housing Energy Saving Programme (£84 million)
 - Winter Fuel Payments for older people (£2.7 billion per year).
- 1.6 In addition to the above, and as part of the European Economic Recovery Plan, the European Commission has also agreed to allow up to 4% (£29 million) of ERDF Programme resources to be devoted to domestic energy efficiency and renewable actions. In August 2009, the Department for Communities and Local Government issued the guidance that measures should be directed at existing social housing as defined in Articles 68 – 70 of the Housing and Regeneration Act 2008.
- 1.7 Article 68 of the Housing and Regeneration Act 2008 defines social housing as:-
 1. low cost rental accommodation and
 2. low cost home ownership accommodation

In the case of (1), accommodation is low cost rental if:-

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- (a) it is made available for rent
- (b) the rent is below market rate, and
- (c) the accommodation is made in accordance with rules designed to ensure that it is made available to people whose needs are not adequately served by the commercial housing market

In the case of (2), accommodation is low cost home ownership if:-

- (a) the accommodation is occupied, or made available for occupation, in accordance with shared ownership arrangements, equity percentage arrangements, or shared ownership trusts: and
- (b) the accommodation is made available in accordance with rules designed to ensure that it is made available to people whose needs are not adequately served by the commercial housing market.

1.8 In response to the above, the Regional Development Agency, had issued a call for the submission of a sub-regional bid that seeks to directly stimulate the market for low carbon and environmental technologies and renewable energies via their application within existing social and low income housing. As the deadline for the submission of Expression of Interest was 9th November 2009, officers from the five local authorities, plus Halton, and representatives from local universities, RSLs, and Utilities have submitted a proposal, a copy of which is attached. Briefly the project will address the following:-

1. Physical housing improvement works to reduce CO2 emissions:
 - ◆ Partners will be commissioned to deliver elements of the targets to ensure complementarity and reduced risk on programme delivery
 - ◆ Large scale innovative programmes of work to tackle hard to treat properties all across Merseyside will be funded (e.g. external wall insulation and ground or air source heat pumps as appropriate to upgrade “No fines Wimpey” housing stock)
 - Diversity of tenures will be tackled although most will be targeted at reaching the private rented and social landlord sector
 - Diversity of measures (including all appropriate microgeneration technologies, upgrading low carbon emission heating technologies and a variety of solid wall insulation technologies). Particular consideration will be given here to measures that have the best change of success in the North West given the current or potential regional strengths, e.g. high efficiency lighting, solar thermal or biomass as evidenced by the NWDA and Envirolink Northwest.
2. Developing small-to-medium sized enterprises (SMEs) and the local supply chain:
 - ◆ Development programmes for upskilling existing trades people to future-proof them to changing markets for safeguarding jobs
 - ◆ Developing capacity of existing SMEs through awareness and guidance of required public sector standards. Additionally opportunity will be through greater markets and generating opportunities for long-term employment and business growth.
 - ◆ Integration with other schemes with particular reference to Future Jobs Fund

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3. Growing the market for a low carbon economy through renewables and energy efficiency:
 - ◆ Raising awareness of and demand for technologies among the public, commissioners and designers will raise demand for Low Carbon and Environmental Goods and Services (LCEGS)
 - ◆ Pump priming the market with these hard to treat technologies will create a local industry base and legislature in the sub-region ready to deliver forthcoming agendas such a Home Energy Saving Strategy (due to start in 2013)
 - ◆ Stimulating the existing low carbon economy will attract more investment and interest in this area for new and emerging SMEs as this funding will attract an estimated £15 million of which up to a possible £11 million will be submitted as match funding from the utilities such as that proposed in the partnership between British Gas and Knowsley Council under the CESP
 4. Evaluation and local learning:
 - ◆ Use of local universities and local enterprises for both new research and evaluation of programmes
 5. Engage with the private landlord sector to complement the ongoing work on a sub-regional accreditation scheme.
- 1.9 The result of the submitted Expression of Interest is expected on 30th November 2009, the outcome of which will be reported verbally at the meeting.

2.0 Comments

- 2.1 If approved by the Regional Development Agency, this project has the potential to kick-start the carbon reduction agenda, particularly by addressing hard to reach residential properties, and at the same time commence the process of developing local SMEs and supply chains for the future. This would safeguard existing jobs and create new job opportunities.
- 2.2 The Expression of Interest submitted does not state who the accountable body should be for this project. Members may be aware that currently Sefton and Wirral are the only two authorities that do not manage a sub-regional project, although under the previous Objective 1 Programme, Wirral was the accountable body for the Mersey Waterfront Programme.
- 2.3 Members may also be aware that under the Objective 1 Programme, Sefton Council was the only authority to have an Action Plan within the sub-region, whereby the authority to appraise, assess, control, manage, and deliver projects was delegated to Sefton by the Government Office. As a result significant experience and expertise exists within the Council to undertake this new project, although the scale and geographical spread would be significantly bigger, and would require additional resources. The ERDF monies could be used for the administration of the bid, and the Consortia as agreed this as a practical way forward. It is estimated this is likely to be in the region of £0.5 million to £1.0 million over five years.
- 2.4 Taking on the accountable body status will, however impose financial and legal responsibilities on the authority. As with other local authorities responsible for delivering sub-regional projects, legal agreements and SLAs would have to be

Agenda Item 9

agreed with all partners, and the delivery of activities relating to the project would have to be pro-actively managed, and co-ordinated.

- 2.5 Notwithstanding the above, the benefits of Sefton Council being the accountable body would allow the authority to develop expertise and experience in areas, which are likely to offer significant economic and social benefits as well as address the climate change, and low carbon economy agenda.

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Expression of Interest (Energy Efficiency and Renewable Energy in Social and Low Income Housing specific call)

Please refer to the enclosed guidance note when completing this form.

NWDA office use only	Project reference number:	
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1. Applicant details:

Contact Name:	David Colbourne		
Position in Organisation:	Sustainable Energy Officer		
Organisation:	Sefton Council		
Address inc Post Code:	4 th floor Magdalen House, Trinity Rd, Bootle, L20 3NJ		
Nature of Business:	Public Sector <input checked="" type="checkbox"/>	Private Sector <input type="checkbox"/>	Third Sector (VCS) <input type="checkbox"/>
Telephone Number(s):	Office:0151 934 4216	Mobile:	
E-mail Address:	david.colbourne@technical.sefton.gov.uk		
Website:	www.sefton.gov.uk		
Date of Expression of Interest:	09 November 2009		

2. Project Outline:

Project Name:	Merseyside (REECH) Renewables and Energy Efficiency in Community Housing		
Project Activity Area (tick one)	Local <input type="checkbox"/>	Sub-Regional <input checked="" type="checkbox"/>	Regional <input checked="" type="checkbox"/> <i>including Halton</i>
Proposed Start Date:	01/4/10	Expected end date:	31/3/13

3. Strategic Fit: / Eligibility with the ERDF North West Operational Programme (NWOP)

Please state whether you are applying under Action Area 1.3 or 2.1 and detail the supporting rationale for this. Please refer directly to the relevant Investment Framework 'Housing Annex' and Guidance' document, all of which can be found at www.erdfnw.co.uk/funding.

Priority Action Area Ref:	1.3
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Supporting rationale: <p>The Liverpool City Region (LCR) REECH project seeks to directly stimulate the market for low carbon/ environmental technologies and energy generation via the application of 5,000 measures within existing social and low income housing. Further to the full output profile detailed in Section 6, this will result in:</p> <ul style="list-style-type: none">• 28 jobs being created and a further 30 safeguarded• An annual increase in gross valued added (GVA) as a result of this programme of £3,510,000• A net change in overall CO2 emissions of 3,357 tonnes per annum <p><i>Such interventions impact positively on EU regulations on social cohesion by addressing imbalances and accord strongly with the objectives of Priority Action Area 1-3 (Increasing Sustainable Consumption and Production). Notably, the project makes significant contributions to Strands 4 and 5 as well as relating to</i></p>
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Agenda Item 9

Strand 1 of Investment Framework AA1-3. This is as detailed below:

STRAND 4 - Expanding the development, demonstration and market development for low carbon technologies and processes in the North West. To support Strand 4 the REECH will:

- a) Channel investment into the demonstration and application of near/ new to market low carbon technologies in existing hard to treat homes to assist their progression to commercial market, e.g. solid wall insulation**
- b) Co-ordinate the capacity of LCEGS businesses to respond to growing market opportunities in the Environmental Technologies (ETS) sector**
- c) Showcase demonstrator projects to highlight innovation, raise awareness and exemplify best practise**
- d) Maximise research and knowledge transfer opportunities between Low Carbon and Environmental Goods and Services (LCEGS) businesses and University partners to expedite product development of low carbon technologies.**

STRAND 5 - Supporting the installation and use of current low-carbon/ low-resource technology and processes. To support Strand 5 the REECH will:

- a) Engage with the regions LCEGS businesses providing sustainable procurement, business support and product development opportunities**
- b) Retrofit low carbon technologies to increase the power and thermal efficiency and reduce the fuel bills of hard to heat homes, e.g. installation of smart metres with real time energy display in support of the Government target of rollout by 2020 (which also supports Strand 4 below)**
- c) Install microgeneration technologies to complement standard insulation measures/ general property improvements**
- d) Develop an area wide low carbon power generation and heating scheme**
- e) Support professional development amongst Professional Services to strengthen the Environmental Technologies & Services (ETS) sector.**

STRAND 1 - Supporting innovative approaches to changing culture and embedding sustainable behaviours and management practices.

The project also encompasses a proposal to part fund a specialist team of Home Energy Advisors who would focus on providing indepth tailored communication, awareness raising and attitudinal work onsite to the owner/occupiers of the hard to treat homes. This would be provided by the Energy Savings Trust as part of its wider programme management support for REECH. It is vital that regular contact is managed with the owner/occupiers of the homes before, during and after the measures are installed to help them understand the impact of the changes on their fuel bills and carbon savings and to encourage them to take further action. If advanced this would help to reduce energy consumption and carbon emissions, directly contributing to Strand 1 of Investment Framework AA1-3.

These interventions draw upon the preferred approach outlined within the Fraser Associate Report (August 2009) and for one programme of activity for Merseyside approved by The Merseyside Partnership in line with the Guidance Note for Applicant relevant to this call.

4. SRAP Fit: *How does your proposal fit with the appropriate Sub-Regional Action Plan(s) or housing and energy strategies?*

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This proposal directly supports one of the primary economic drivers identified within the Liverpool City Region (LCR) Multi Area Agreement (MAA) namely:

Transformational Action Area 3 – Low Carbon Economy

REECH helps to address one of the main sources of carbon in the sub-region – emissions from residential buildings. By directing action towards the reduction of the carbon output from residential buildings and increased take-up of renewables and energy efficient technologies, the project helps to support innovation, enterprise and LCEGS sector development, moving the sub-region a step closer to its low carbon ambition.

Furthermore, the project also aligns with the housing priorities outlined within the MAA to:

- Improve the quality and environmental impact of existing housing
- Channel European Structural Funds to support energy efficiency and affordable warmth programmes, with associated training/ employment opportunities
- Improve the condition of private rented stock to provide higher quality housing options
- Focus and co-ordinate resources to secure the regeneration of Vulnerable Housing Market Areas (worst 15%) identified within the LCR Housing Strategy.

In addition, REECH responds to some of the key intervention areas highlighted within the ‘Mini-Stern’ study, ‘The Economic Impact of EU and UK Climate Change Legislation on Liverpool and Liverpool City Region,’ as detailed below:

- Sector development for ETS
- Skills capacity in sustainable construction
- Energy efficiency in social rented housing
- Energy efficiency in private rented housing.

This is aligned to the wider existing NWDA Regional Economic Strategy and its Climate Change Action Plan to encourage the installation of renewable and energy efficient technologies and maximise the regional access to financial mechanism to reduce upfront costs for householders including the fuel poor (Action 7.2) and the Regional Spatial Strategy and its Sustainable Energy Strategy for plans to promote the sustainable production and consumption of energy (EM15, EM16, and EM17). Furthermore the Regional Housing Strategy also has the objective of “continuing to raise the quality of the existing housing stock”.

The Merseyside Affordable Warmth Strategy also calls for joint action and co-ordinated work to address Fuel Poverty as its serious subregional issue recognised nationally due to the scale of the impact.

In terms of additionality, REECH will complement and leverage other discrete low carbon community schemes within the sub-region. This will include the recently announced Community Energy Saving Programme (CESP) partnership by the energy supplier British Gas with Knowsley Council and possible proposals for Carbon Energy Reduction Targets (CERT), the Energy Saving Trust’s PAYS, DECC Low Carbon Community Challenge, and Ofgem’s Low Carbon Networks Fund.

5. Project Description: *Please provide a brief (bullet point) description of the project including what the funding will actually be used for.*

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REECH is predominantly concerned with developing the capacity of the sub-region's LCEGS providers, encouraging it to develop and implement new approaches to tackle an identified need in the housing stock. The latest fuel poverty figures published in October 2009 by national Government show that the North West has the highest number of households in fuel poverty at nearly 0.5 million which is 17% of the total number of households. The poor historical housing stock and low incomes experienced across Merseyside make this area an opportunity to pilot and develop new innovative approaches and methods. By addressing market failure through the installation of low carbon technologies in hard to treat homes Merseyside will increase GVA and jobs created or safeguarded in this sector and in addition will help to alleviate fuel poverty and reduce carbon emissions for the sub-region and wider region. This will be achieved by developing local capacity to target social and low income housing where traditionally these measures have been targeted at the more affluent or the fuel rich or able to pay.

So for instance, specifically in terms of the CESP partnership between British Gas and Knowsley Council, this involves 14 of the 10% most deprived Lower Super Output Areas (LSOA) in the income domain of the Index of Multiple Deprivation (2007). Notably where the hard to treat properties are "No fines Wimpey" and "Camus" construction. Approximately 1,335 targeted households from a mix of 5 tower blocks, 62 flats and 823 terraced houses in Stockbridge Village will possibly benefit from a variety of measures including external cladding and biomass boilers.

Building on this a co-ordinated and diverse mixture of low carbon programmes by key housing bodies will create a learning environment, central access point and a whole greater than the sum of parts across Merseyside. This is as detailed below:

Physical housing improvement works to reduce CO2 emissions:

- ◆ Partners will be commissioned to deliver elements of the targets to ensure complementarity and reduced risk on programme delivery
- ◆ Large scale innovative programmes of work to tackle hard to treat properties all across Merseyside will be funded (e.g. external wall insulation and ground or air source heat pumps as appropriate to upgrade "No fines Wimpey" housing stock)
 - Diversity of tenures will be tackled although most will be targeted at reaching the private rented and social landlord sector
 - Diversity of measures (including all appropriate microgeneration technologies, upgrading low carbon emission heating technologies and a variety of solid wall insulation technologies). Particular consideration will be given here to measures that have the best change of success in the North West given the current or potential regional strengths, e.g. high efficiency lighting, solar thermal or biomass as evidenced by the NWDA and Envirolink Northwest.

Developing small-to-medium sized enterprises (SMEs) and the local supply chain:

- ◆ Development programmes for upskilling existing trades people to future proof them to changing markets for safeguarding jobs
- ◆ Developing capacity of existing SMEs through awareness and guidance of required public sector standards. Additionally opportunity will be through greater markets and generating opportunities for long term employment and business growth.
- ◆ Integration with other schemes with particular reference to Future Jobs Fund

Growing the market for a low carbon economy through renewables and energy efficiency:

- ◆ Raising awareness of and demand for technologies among the public, commissioners and designers will raise demand for LCEGS
- ◆ Pump priming the market with these hard to treat technologies will create a local industry base and legislature in the sub-region ready to deliver forthcoming agendas such a Home Energy Saving Strategy (due to start in 2013)
- ◆ Stimulating the existing low carbon economy will attract more investment and interest in this area for new and emerging SMEs as this funding will attract an estimated £15 million of which up to a possible £11 million will be submitted as match funding from the utilities such as that proposed in the

Agenda Item 9

partnership between British Gas and Knowsley Council under the CESP

Evaluation and local learning:

- ◆ Use of local universities and local enterprises for both new research and evaluation of programmes
- ◆ Engage with the private landlord sector to complement the ongoing work on a sub-regional accreditation scheme.

6. Output Profile: *Please state how your project will contribute to delivery of the overall Programme targets. Again, you should refer to the Investment Frameworks ‘Housing Annex’ and Guidance note, available on the ERDF website - www.erdfnw.co.uk/funding*

No of Businesses assisted to improve performance	100
No of Businesses assisted to reduce industrial and commercial waste	0
No of Jobs created	28
No of jobs safeguarded	30
no of business with reduced industrial or commercial waste	0
No of applications of low carbon technologies	5000
Reduction in annual CO2 emissions from programme interventions (tonnes pa)	4,476
Annual increase in GVA as a result of the programme	£3,510,000
Increase in employment	52
Net change in overall CO2 emissions (tonnes pa)	3,357

Please outline your rationale in calculating these outputs:

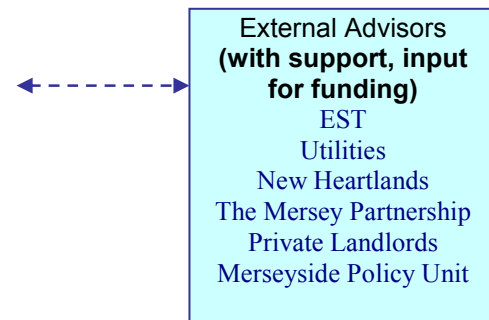
These outputs have been calculated using existing project ideas and an illustrative mix of measures. Use of the Energy Saving Trust economic and emissions assessment tools has been employed to gauge levels of outputs based on renewable and energy efficiency measures.

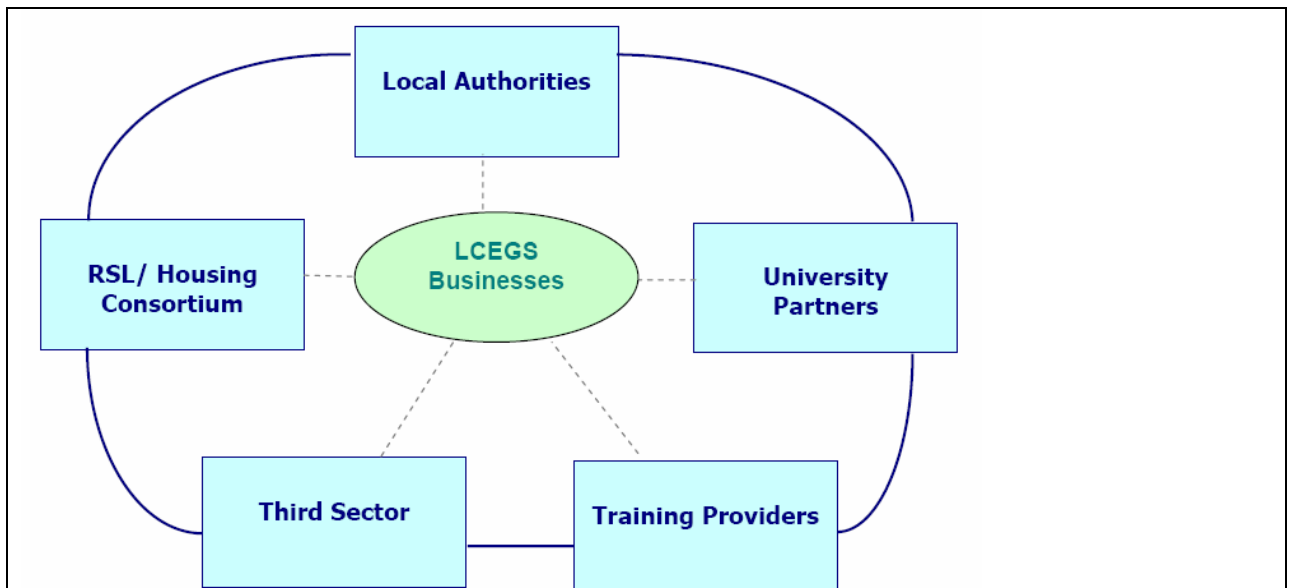
7. Partnerships and links to other activities: *Please provide detail on the partnership arrangements for this ‘programme of activity’, highlighting which organisations will be involved in the delivery of activities (and what they will be responsible for) and how this project links into other initiatives and programmes.*

Partnership Arrangements

This project encompasses a multi-agency approach at the sub regional level, as detailed below.

Figure 1 – Key Partners





Local authority partners comprise all 5 Merseyside unitary bodies - Knowsley, Liverpool, Sefton, St Helens, and Wirral with the addition of Halton to complement the Liverpool City Region partnerships (also many of the active RSL partners have significant stock Halton thereby providing a more natural boundary. One of the 6 LCR local authorities will lead the project and act as accountable body. This role will be finalised during the full application process. REECH will be also supported in this regard by an established Steering Group with representation from the project partners detailed in Figure 1, in addition to Merseyside Policy Unit and The Mersey Partnership.

The councils will work in close collaboration with Registered Social Housing providers include Plus Dane Group, Riverside, Liverpool Housing Trust, Venture Housing, Liverpool Mutual Homes, Helena Partnerships, Halton Housing Trust, One Vision Housing, Knowsley Housing Trust, Regenda and Wirral Partnership Homes. With more to follow. This will ensure the project targets the most suitable households.

Capacity building, Awareness Raising among SME of upcoming Low Carbon economy opportunities and skills development will be provided by partners drawn from third sector or social economy in the form of Fusion 21 and the Merseyside Network for Europe.

The scheme will be complemented by the input of educational partners in the form of Liverpool John Moores University and University of Liverpool who will provide robust academic research and oversight.

Critically, dedicated technical advice on low carbon living and general programme support capacity will also be drawn from the Energy Savings Trust utilising and building on their existing infrastructure.

Finally, the REECH project will also complement and leverage wider work on low carbon communities with utility partners like British Gas with Knowsley Council on CESP.

This indicative model will provide a critical platform to engage with LGECS businesses, identifying those that need support or appropriate assistance to optimise success. This engagement is likely to involved collaboration with multiplier agents which might include, but is not restricted to, the likes of Business Link Northwest and Envirolink Northwest.

Opportunities for collaborative and co-ordinated working with other complementary initiatives and programmes will be progressed in more detail throughout the project development phase.

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Should this enquiry be successful the consortium partners would wish to support and include other successful enquiries either at subregional level or regional initiatives looking to operate in the REECH area to maximise co-ordinated and greater impact on the deprived areas.

8. Funding: *What are the estimated costs of the project? (including capital / revenue split). Please note, figures given below should relate only to the 'eligible' spend, apportioning out any activity that is not part of the ERDF funded activity.*

Total Project Cost (£'s):	£22.8 million (£22 million is Merseyside element)	Capital (£'s)	£18.5 million
		Revenue (£'s)	£3.5 million
Total ERDF Funding Required (£'s):	£11.4 million (£0.4 million from outside Merseyside allocation)	Capital (£'s)	£10 million
		Revenue (£'s)	£1 million
Total Match Funding Required (£'s):		Has this match funding been confirmed in writing?	
NWDA <input type="checkbox"/>		Yes <input type="checkbox"/> No <input type="checkbox"/>	NB: Written confirmation that your match funding is secured, or that a named source has been identified and agreed, must be attached to this application.
Other Public <input checked="" type="checkbox"/>	£1 million	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	
Private <input checked="" type="checkbox"/>	£10.4 million	Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	
Other <input type="checkbox"/>		Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>	

Estimated spend profile (£'s)	Yr1 (2010)	Yr2 (2011)	Yr3 (2012)	Future Years	Totals
Capital (£'s)	2,300,000	9,400,000	7,800,000	1,000,000	19,500,000
Revenue (£'s)	750,000	1,000,000	1,550,000	250,000	3,300,000
Totals (£'s)	3,050,000	10,400,000	9,350,000	1,250,000	22,800,000

9. Apportionment of funding: *Please tell us if any of the finances shown above need to be apportioned between SME and residential activity, showing the estimated split.*

It is estimated that 84% of the funding will be spent on residential, however it is envisaged that SMEs will be the chief contractors and hence responsible for 50% of the delivery also. Workstreams will be deliberately apportioned in multiple blocks to ensure smaller local contractors can deliver and avoid diseconomies of scale encountered when trying to procure a single contractor for multiple specialisms where each risk element adds an additional cost and management fee. REECH will work collaboratively with British Gas to help ensure its whole project management of CESP including use of suppliers appropriately supports local SME provision.

Thank you for completing this Expression of Interest Form.
Please return it via e-mail to erdf@nwda.co.uk

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REPORT TO: Cabinet Member – Technical
Cabinet Member – Environmental
Cabinet Member - Regeneration
Cabinet

DATE: 2nd December 2009
16th December 2009
16th December 2009
17th December 2009

SUBJECT: Potential Funding Opportunity 2- Low Carbon Communities Challenge 2010-2012

WARDS AFFECTED: Harrington, and Ravenmeols

REPORT OF: Alan Moore, Deputy Chief Executive and Strategic Director
Andy Wallis – Planning and Economic Regeneration Director

CONTACT OFFICER: Mo Kundi X3447

**EXEMPT/
CONFIDENTIAL:** No

PURPOSE/SUMMARY:

To inform Members of the resources being made available under the Low Carbon Communities Challenge Programme, and the request by Formby Parish Council to assist them in the development and delivery of a successful bid for which the Parish Council will be the accountable body.

REASON WHY DECISION REQUIRED:

Any assistance to Formby Parish Council in the development of the bid, and if successful the delivery of the project will require significant officer time input, for which Cabinet approval is necessary.

RECOMMENDATION(S):

That Cabinet Members for Technical, Environmental and Regeneration:-

1. Note the report, and that the

Cabinet:-

1. Approve that Sefton officers assist Formby Parish Council in the development of the bid, and then, if successful, with its delivery.
2. Request further reports

KEY DECISION: Yes

FORWARD PLAN: Yes

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IMPLEMENTATION DATE: After the call in period

ALTERNATIVE OPTIONS:

Sefton Council is eligible to bid for funding under the Low Carbon Communities Challenge 2010-2012. However, the programme requires significant engagement and involvement of the community during all stages of the project. This is better suited to a local parish council. However, Formby Parish Council has no experience or expertise in developing bids, or delivery projects, and has requested assistance from Sefton Council. Not to assist would mean the loss of opportunity to attract funding, and more critically progress the climate reduction agenda at a community level.

IMPLICATIONS:

Budget/Policy Framework:

Financial: There are no direct financial implications as a result of this report.

<u>CAPITAL EXPENDITURE</u>	2006/ 2007 £	2007/ 2008 £	2008/ 2009 £	2009/ 2010 £
Gross Increase in Capital Expenditure				
Funded by:				
Sefton Capital Resources				
Specific Capital Resources				
<u>REVENUE IMPLICATIONS</u>				
Gross Increase in Revenue Expenditure				
Funded by:				
Sefton funded Resources				
Funded from External Resources				
Does the External Funding have an expiry date? Y/N	When?			
How will the service be funded post expiry?				

Legal: N/A

Risk Assessment: N/A

Asset Management: N/A

CONSULTATION UNDERTAKEN/VIEWS

Technical Services
 Environmental Services
 Leisure and Tourism
 Legal
 Finance

CORPORATE OBJECTIVE MONITORING:

<u>Corporate Objective</u>		<u>Positive Impact</u>	<u>Neutral Impact</u>	<u>Negative Impact</u>
1	Creating a Learning Community	/		
2	Creating Safe Communities	/		
3	Jobs and Prosperity	/		
4	Improving Health and Well-Being	/		
5	Environmental Sustainability	/		
6	Creating Inclusive Communities	/		
7	Improving the Quality of Council Services and Strengthening local Democracy	/		
8	Children and Young People	/		

LIST OF BACKGROUND PAPERS RELIED UPON IN THE PREPARATION OF THIS REPORT

Report to Leaders Group meeting on 19th November 2009

Agenda Item 10

1.0 Background

- 1.1 Members may be aware of a report entitled 'The Development Low Carbon Economy in response to Climate Change, presented to Cabinet Member Environment (18th November 2009), Cabinet Member Technical Services (18th November 2009), Cabinet Member Regeneration (23rd November 2009), and the Cabinet on 25th November 2009.
- 1.2 The report makes reference, inter alia, to a number of funding opportunities being made available by Central Government as part of its energy efficiency programme, including the Low Carbon Communities Challenge 2010-2012.
- 1.3 The Challenge is about involving a broad section of people living and working in communities to develop plans for their area that integrate technology or infrastructure – such as wind farms, electric cars or home energy refurbishment – with financial and behavioural measures to create a broader low carbon area or zone.
- 1.4 The Government is making available financial support of up to £500,000 for capital expenditure, and will introduce successful bidders to partners who are offering free training, advice or support, and then evaluate the progress by gathering data and perspectives of what is and what is not successful.
- 1.5 The Government is looking to work with 20 'test-bed' communities already facing change in the area as a result of green or low carbon infrastructure or behavioural measures, with an interest in using this to spur the development of broader plans for cutting carbon emissions in their area.
- 1.6 Within Sefton only Formby stands out as an area where there are currently some 'low carbon infrastructures', and these include wind turbines at Range High School, and St. Jerome's School. The latter also features photovoltaic panels, grey water systems etc.
- 1.7 Officer had a number of discussions with Formby Parish Councillors, and at their meeting on 3rd November 2009, Formby Parish Council formally agreed to submit a bid under the Low Carbon Communities Challenge Programme, and requested Sefton Council's assistance. A copy of the letter is attached to this report as Annex A. The closing date for the submission of the bid is 30th December 2009, with successful applicants being informed on 25th January 2010.

2.0. Comments

- 2.1 Sefton Council, as a local authority is eligible to apply on behalf of local residents where, for example, a low carbon infrastructure is planned. However given the need to engage, and carry the community at all levels of the project,

from its development, delivery, and beyond, it was felt that an application from a local parish council would be more appropriate. Formby Parish Council has recognised this, and is prepared to engage the community, and other potential stakeholders, including Formby Civic Society, local Churches, local businesses via the Formby Business Village Partnership, Formby Pool Trust, local Schools, local Sefton Ward Members, etc. A copy of a submission by the Parish Council to Formby Area Committee, requesting its support is also attached as Annex B.

- 2.2 However, Formby Parish Council has also recognised that it has limited expertise and experience in developing and delivery projects of this nature. In addition, it has very limited dedicated officer capacity. It has therefore formally asked Sefton Council to assist them in the development and delivery of a successful bid for which the Parish Council will be the accountable body.
- 2.3 Members may recall that a similar request for assistance from Lydiate Parish Council was agreed by the Cabinet, which led to the successful draw down of HLF money (£500,000), and the delivery of the Lydiate Village Centre, which is expected to open in December 2009.
- 2.4 From Sefton's perspective, there will be a significant demand on Sefton officers' time, initially in the development and submission of the bid, and then if successful the delivery the project. However, the project does offer the opportunity to progress the Climate Reduction, and Low Carbon Economy agenda, particularly at community level, and the opportunity to develop new expertise and experience in a field that is at its formative stage, but statutory obligations will require its expansion.

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Annex A

Tel: 0151 928 5667
e-mail to: formbypc1@aol.com

Please Reply To:
Clerk to the Council
Mrs J Davis
27 Marlborough Road
WATERLOO
Liverpool L22 1RT

JED/MC/C3
6 November 2009

Mr M Kundi
Planning & Economic Regeneration Manager
Planning & economic Regeneration Department
Sefton MBC
Investment Centre
375 Stanley Road
Bootle

Dear Mr Kundi

CLIMATE CHANGE CHALLENGE

The Formby Parish Council has considered the proposal for it to make an application to this fund, which is aimed at providing funds for capital expenditure to assist communities determined to reduce their carbon generation.

At the Council meeting on the 3rd November 2009 the Council agreed that it makes good sense to take this forward embodying it into the Parish Community Plan. It is seen that we are a community in Sefton which would benefit from the project, building on our environmental track record and our ability to manage it successfully.

Two Councillors, Sean Brady and Michael Coles have been asked to make the application and to work with you in Sefton Metropolitan Borough Council to benefit the community as a whole.

The full application is in preparation and will be complete by mid December 2009 following a full working meeting of the Council at the end this month. It is proposed to set up a steering group consisting of members of the Parish Council, the Formby Area Committee and members of the public and representatives of interested bodies.

Continued ...

Page 2

6 November 2009

We would ask you to accept this letter as confirmation of our decision.

Yours sincerely

Joanne Davis MCIPD
Clerk to the Parish Council

cc David Packard – Magdalen House

FORMBY PARISH COUNCIL **Climate Change Challenge**

Submission to the Formby Area Committee November 2009

As a result of our joint meetings recently, the Formby Parish Council discussed the Climate Change Challenge at its meeting on the 3rd November 2009. It was agreed that the Parish Council will submit an application in an endeavour to gain access to funding for Formby.

The application is now being developed but it will focus upon investment in public and domestic programmes aimed to significantly reduce the consumption of energy by using a wide range of initiatives incorporating solar and heat recovery technology and through educational initiatives in schools and in the wider community. Other initiatives complementary to this aim will be developed.

It is a fact that Formby is a discreet community with an established history of awareness in its heritage, of the local fragile environment and its responsibility to protect and sustain it.

It should be noted that the focus upon the flood risks were first instigated by the Council in view of its continuous concern over the safety of the residents and their property, especially in regard to the replacement of the pumping stations at Crossens and Altmouth.

The Council has regularly monitored the condition of the water courses in Formby and the inadequate drainage system by way of its Stewardship reports which are reported to the officers responsible in Sefton MBC. The ongoing issues of Long Lane/Dobbs Gutter reveal how difficult it is to maintain and improve.

The Area Committee has provided financial support towards the improvements we have made in Chapel Lane replacing the street furniture and improving the general appearance of the village centre. As a consequence of this early work, the Memorial Gardens have been cleared of dead vegetation and have been replanted with new shrubs and bedding plants. This project is set to continue and has already been recognised but the Royal Horticultural Society with an award for the work done so far.

The FPC has funded more plant purchases, together with a complete refurbishment of the benches donated to the community over many years. This has been achieved by careful consultation through the local societies the local press and public consultation, with individuals who have made useful contributions to the work. Local retailers and groups have contributed money and gifts such as daffodil bulbs for the benefit of all the community.

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The Parish Council believes it has a proven record of community involvement and consultation, which allows it to make this application to the Challenge. It asks for your support in this venture.

It is proposed to set up a body representative of the community to oversee this work which will include representatives of the Area Committee, the Parish Council the Civic Society, the Formby Partnership, the Formby Pool Trust and individuals representing the business community and residents. We would ask you please to suggest two members of the Area Committee to help in this task.

M. COLES

05 November 2009

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Agenda Item 11

REPORT TO: Cabinet Member Regeneration

DATE: 16th December 2009

SUBJECT: HMR Department, Service Delivery Plan '09-10, half year performance progress

WARDS AFFECTED: Linacre, Derby, Litherland, Church, Netherton & Orrell

REPORT OF: Housing Market Renewal Director

CONTACT OFFICER: N Davies, HMR Strategy Manager: 934 4837

**EXEMPT/
CONFIDENTIAL:** No

PURPOSE/SUMMARY:

To advise Cabinet Member Regeneration on progress towards achieving the Departments objectives and targets in 2009-10

REASON WHY DECISION REQUIRED:

The report is for information

RECOMMENDATION(S):

Cabinet Member Regeneration notes the report

KEY DECISION: No

FORWARD PLAN: No

IMPLEMENTATION DATE: Following the expiry of the call in period for the minutes of the meeting

Agenda Item 11

ALTERNATIVE OPTIONS:

None

IMPLICATIONS:**Budget/Policy Framework:** None**Financial:** N/A

<u>CAPITAL EXPENDITURE</u>	2006/ 2007 £	2007/ 2008 £	2008/ 2009 £	2009/ 2010 £
Gross Increase in Capital Expenditure				
Funded by:				
Sefton Capital Resources				
Specific Capital Resources				
<u>REVENUE IMPLICATIONS</u>				
Gross Increase in Revenue Expenditure				
Funded by:				
Sefton funded Resources				
Funded from External Resources				
Does the External Funding have an expiry date? Y/N	When?			
How will the service be funded post expiry?				

Legal: None

Risk Assessment:

1. Failure to achieve targets will mean that Departmental and Corporate Objectives will not be met.
2. Some targets are linked to the Deed of Variation funding agreement with HCA. Poor performance on these targets may affect future HMR funding allocations

Asset Management: None**CONSULTATION UNDERTAKEN/VIEWS**

None

CORPORATE OBJECTIVE MONITORING:

<u>Corporate Objective</u>		<u>Positive Impact</u>	<u>Neutral Impact</u>	<u>Negative Impact</u>
1	Creating a Learning Community	X		
2	Creating Safe Communities	X		
3	Jobs and Prosperity	X		
4	Improving Health and Well-Being	X		
5	Environmental Sustainability	X		
6	Creating Inclusive Communities	X		
7	Improving the Quality of Council Services and Strengthening local Democracy	X		
8	Children and Young People	X		

<p>LIST OF BACKGROUND PAPERS RELIED UPON IN THE PREPARATION OF THIS REPORT HMR Service Delivery Plan 'Sprint' Departmental Reports</p>

Agenda Item 11

1. BACKGROUND:

1.1 As part of the Corporate Performance Management Framework, departmental service delivery plans are reviewed each quarter. This report summarises the progress made over the first half year of 2009-10, towards meeting departmental targets and objectives.

2. Performance Progress

2.1 A detailed 'Sprint' report is appended to this report. In total there are 14 'Actions', which in turn contain 20 individual 'Activities'. In summary, progress against the range of these 'Actions' and 'Activities' is given below.

	Actions	Activities
Total Number	14	20
Completed/ Completed in Year	7	11
On Target	7	8
Overdue	0	1

2.2 Some of the Targets and Activities are linked to the Funding Agreement (Deed of Variation) with the Homes and Communities Agency (HCA). All of the targets associated with these activities are on target to be met by the end of the financial year.

2.3 Only 1 activity is overdue. This is ...'Develop an Empty Property Strategy', which is linked to the Action, DSP-HMR-AP-008. This Strategy was originally due to have been in place by March 2009. However, due to delays to the introduction of a new Private Sector Housing Strategy, which was approved by Cabinet in July 2009, following extensive consultations, the introduction of a new Empty Property Strategy was also delayed. However, this was submitted for approval to the Cabinet meeting on the 29th of October '09.

SEFTON METROPOLITAN BOROUGH COUNCIL



Departmental Service Plan Monitoring

Housing Market Renewal Initiative (HMRI)

Quarter 2 2009/10

Author: Performance and Partnerships

Print Date: 26/10/2009

<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
COR-HMR-AP-017 Remediate to residential standards former industrial sites in south Sefton as part of Housing Market Renewal activity to protect greenfield sites from housing development	Alan Lunt	Alan Lunt	31-Mar-2009	On Target

Progress Summary

<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>
Quarter 2	On Target	80
Quarter 1	On Target	70

<u>Progress</u>	<u>Issues affecting current/future progress & corrective actions</u>
<p>Remediation strategies have been agreed for 2 sites; the former Tannery and Penpol sites.</p> <p>Remediation contractors have recently been appointed, and work should commence during October 2009. The works should be completed by spring 2010.</p>	

<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
HMRI Programme involves the acquisition of land and property to assemble sites for new residential development. Before new development can start sites [usually] require remediation works to make them fit for development. This is particularly the case with former industrial sites.		Tom Clay	31-Mar-2009	Completed

<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
COR-HMR-AP-025 Stimulate mixed tenure/sustainable development as part of Housing Market Renewal activity	Alan Lunt	Alan Lunt	31-Mar-2009	Activities

<u>Progress Summary</u>		
<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>
Quarter 2	Activities	99
Quarter 1	On Target	97
Quarter 1	On Target	97

<u>Progress</u>	<u>Issues affecting current/future progress & corrective actions</u>
<p>At the end of 2008-9 103 new homes had been built, of which 71 were affordable homes.</p> <p>At the end of the 1st quarter, 28 additional new homes have been completed.</p> <p>At the end of Quarter 2, a further 6 new homes have been completed. This takes the cumulative total to 137 new homes, against a target of 135 new homes by March 2010.</p> <p>A further 6 new homes should be completed before the end of the year.</p>	

<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
To facilitate and support the construction of new homes; offering a variety of types and tenures of new homes, to improve the housing market across the HMRI area.	At the end of 2008-9 103 new homes had been built, of which 71 were affordable homes. At the end of the 1st quarter, 28 additional new homes have been completed. At the end of the second quarter a further 60 homes had been completed. This takes the cumulative total to 137 new homes, against a target of 135 new homes by March 2010. A variety of housing types have been built, including houses, flats and some bungalows	Alan Lunt	31-Mar-2009	On Target

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<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
COR-HMR-AP-026 Develop masterplan visions for sustainable communities as part of Housing Market Renewal activity	Alan Lunt	Alan Lunt	31-Mar-2009	Activities

<u>Progress Summary</u>		
<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>
Quarter 2	Activities	80
Quarter 1	Activities	80

<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
<p>Page 166</p> <p>uce long term Planning masterplans for all 5 HMRI hbourhoods.</p>	<p>Masterplans are in place for 4 of the 5 HMRI neighbourhoods. The outstanding neighbourhood is Seaforth-Waterloo. A Masterplan for this area can only be developed once the Council's Planning Core Strategy is approved; which will be post 2011.</p>	Neil Davies	31-Mar-2009	Activities

<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
DSP HMR AP 013 To have in place a 'Sefton Integrated Investment Strategy' approved by the Sefton Borough Partnership. To agree an Investment Strategy with the Homes and Communities Agency, thereby securing their commitment to invest in the Borough.	Alan Lunt	Alan Lunt	31-Mar-2010	Completed

<u>Progress Summary</u>		
<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>
Quarter 2	Completed	100
Quarter 1	Completed	100

<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
on Integrated Investment Strategy approved by on Borough Partnership	SIIS Approved by Cabinet and SBP in May 2009	Alan Lunt	30-Jun-2009	Completed

<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
DSP-HMR-AP-001 To ensure that all new-build units in the HMRI area achieve the 'Lifetime Homes' external standard, the 'Building for Life' Silver standard, and Level 3 of the Code for Sustainable Homes thus enabling the changing needs of a household to be met without the need for major refurbishment / remodelling or the need to move home	Alan Lunt	Tom Clay	31-Mar-2011	On Target

<u>Progress Summary</u>		
<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>
Quarter 2	On Target	99
Quarter 1	On Target	99

<u>Progress</u>	<u>Issues affecting current/future progress & corrective actions</u>
<p>During the first quarter of 09-10, 3 new residential planning applications have been approved, with a total of 124 dwellings.</p> <p>During the second quarter a further 4 new schemes have received planning approval, with a total of 91 dwellings.</p> <p>Together with the 37 dwellings approved in '08-9, the cumulative total is 252 dwellings approved with the various design standards applied, which is ahead of the relative target of 135 units approved.</p>	

<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
135 new-build units with Planning approval to achieve Lifetime Homes Standard, Building for Life Silver standard, and Level 3 of the Code for Sustainable Homes (cumulative for 2008-09 and 2009-10)	As at the end of 2008-09, 37 units had planning approvals with conditions that the properties will achieve these standards. Over the first half of 2009 a further 7 schemes have received planning approval with 215 dwellings. The cumulative total is 252 dwelling with approval which is ahead of the cumulative target of 135 dwellings.	Tom Clay	31-Mar-2010	On Target

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<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
DSP-HMR-AP-002 To undertake detailed site investigations on sites that can be accessed for such purposes within the HMRI area, in order to assess their potential for causing potential danger to human health as a result of contamination and develop effective remediation strategies to ensure that the risks of such are mitigated effectively	Alan Lunt	Tom Clay	31-Mar-2011	Completed

<u>Progress Summary</u>		
<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>
Quarter 2	Completed	100
Quarter 1	On Target	70

<u>Progress</u>	<u>Issues affecting current/future progress & corrective actions</u>
Remediation strategies have been completed for 2 sites on Hawthorn Road; the former Tannery site and the Penpol site. Contractors have recently been appointed and work will start on site during October 2009.	

<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
Develop approved remediation strategies in respect of two sites within the Hawthorne Road Corridor	Remediation strategies are completed and in place for 2 sites - the former Tannery site and the Penpol site. Contractors are now appointed and work will begin on site during October 2009.	Tom Clay	30-Sep-2009	Completed

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<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
DSP-HMR-AP-005 Continue to deliver new-build dwellings in south Sefton in a mix of tenure, cost and size so as to provide suitable accommodation for sustainable communities for the future	Alan Lunt	Tom Clay	31-Mar-2011	Activities

Progress Summary

<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>
Quarter 2	Activities	99
Quarter 1	On Target	97

Progress

At the end of the 1st quarter, 28 additional new homes have been completed. A further 6 new homes have been completed by the end of Quarter 2. This takes the cumulative total to 137 new homes, against a target of 135 new homes by March 2010.

Issues affecting current/future progress & corrective actions

<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
new-build units completed (cumulative for 2008-09 2009-10) of which at least 40 are affordable homes (30%)	As at the end of 2008-09 103 units had been completed, of which 71 are affordable. By Quarter 2 a further 34 new homes have been completed, taking the cumulative total to 137, against a target of 135 by March 2010.	Tom Clay	31-Mar-2010	Activities

<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
DSP-HMR-AP-006 To continue to effectively tackle the over-supply of low demand / obsolete houses so as to protect adjacent areas from similar decline, thus protecting the built form heritage of south Sefton	Alan Lunt	Tom Clay	31-Mar-2011	Completed

<u>Progress Summary</u>		
<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>
Quarter 2	Completed	100
Quarter 1	Completed	100

<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
Properties demolished (cumulative for 2008-09 and 09-10) By the end of 2008-9 a total of 229 properties had been demolished	By the end of Quarter 1 [09-10] a further 103 properties had been demolished, taking the cumulative total to 332, which is ahead of the annual and 2 year target. It is unlikely that there will be much further demolition activity this year.	Tom Clay	31-Mar-2010	Completed

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<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
DSP-HMR-AP-007 To continue to effectively tackle the over-supply of low demand / obsolete houses so as to protect adjacent areas from similar decline, thus protecting the built form heritage of south Sefton	Alan Lunt	Tom Clay	31-Mar-2011	On Target

Progress Summary

<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>
Quarter 2	On Target	97
Quarter 1	On Target	78

Progress

Issues affecting current/future progress & corrective actions

At the end of 2008-9 a total of 131 properties had been acquired for redevelopment.
 At the end of Quarter 1, 10 more properties had been acquired.
 At the end of quarter 2 a further 33 properties have been acquired, taking the relative total to 174 properties, against a cumulative target of 180 properties.
 Further property acquisitions are likely over the remainder of the year.

<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
Properties acquired (cumulative for 2008-09 and 2009-10)	By the end of 2008-09, 131 units had been acquired Over the first half of 2009/10 a further 43 properties had been acquired taking the cumulative total 174 properties against a target of 180 properties.	Tom Clay	31-Mar-2010	On Target

<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
DSP-HMR-AP-008 To contribute towards an effective policy aimed at tackling long term vacant residential / commercial properties in south Sefton	Alan Lunt	Neil Davies	31-Mar-2011	On Target

<u>Progress Summary</u>		
<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>
Quarter 2	On Target	75
Quarter 1	On Target	50

<u>Progress</u>	<u>Issues affecting current/future progress & corrective actions</u>
Progress is being made on all of the individual activities. A key activity is to have a new, approved Empty Properties strategy in place. A draft is in place, and this will be presented to Cabinet in October 2009.	

<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
n to Implement Empty Properties Strategy	Officers from HMR, Planning, Environmental Protection, together with Neighbourhood RSL partners, have formed a Dilapidated Buildings Group. They meet to identify problematic empty properties, maintain a list of them, prioritise action, and track the progress of actions agreed.	Neil Davies	30-Sep-2009	On Target
Develop draft Empty Properties Strategy	Revised target to submit an Empty Property Strategy for approval by Cabinet during October 2009. This is now included on the Forward Plan, with the aim of taking a report to the meeting on the 29th October 2009.	Neil Davies	31-Mar-2009	Delayed
Establish a system of 'grading' empty properties so as to provide means of prioritisation	The 'grading system' will be a feature of the new Empty Properties strategy, which should be approved during October 2009.	Robert Cannon	30-Sep-2009	On Target
Maintain a list of long term vacant properties within the HMRI area, and identify all problematic properties for action	System established with Planning Dept and Neighbourhood partners to monitor empty properties across the HMRI area	Robert Cannon	31-Mar-2010	On Target

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<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
DSP-HMR-AP-009 To ensure that all new-build dwellings approved within the HMRI area achieve the 'Secure by Design' standard	Alan Lunt	Tom Clay	31-Mar-2010	Activities
<u>Progress Summary</u>				
<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>		
Quarter 2	Activities	99		
Quarter 1	On Target	97		
<u>Progress</u>				
<u>Issues affecting current/future progress & corrective actions</u>				
During Quarter 2, 6 new homes have been built to this standard, taking the total for the year to date to 34, and 137 cumulative [2008-9 and 2009-10], against a target of 135 completions.				
<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
New Build Properties achieving 'Secure by Design' is (cumulative for 2008-09 and 2009-10)	By the end of 2008-09, 103 homes had been built to this standard. By the end of quarter 2, a further 34 homes have been built to this standard, taking the cumulative total to 137, against a target of 135 completions.	Tom Clay	31-Mar-2010	Activities

<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
DSP-HMR-AP-010 Ensure that the Department achieves Level 4 of the Qualities Standard for Local Government	Alan Lunt	Tom Clay	31-Mar-2009	Completed

<u>Progress Summary</u>		
<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>
Quarter 2	Completed	100
Quarter 1	Completed	100

<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
<p>Page 17</p> <p>achievement of 100% of required standard for Level 4, which will be measured at a corporate level</p>	<p>As at the end of 2008-09 we reported that HMR Dept is 97% completed. Work by the HMR Dept is now effectively completed, outstanding issues are being dealt with at a corporate level.</p>	Karen McComish	31-Mar-2009	Completed
<p>These targets arising from EIA Action Plans are maintained, and maintain evidence that progress is being made to achieve the targets.</p>	<p>There 10 principle actions arising from the EIA. 8 had been implemented by March 2009. The other 2 Actions related to the rehousing of under 18-yr. olds. These have been dealt with and resolved, as part of the Council's review of it's Homelessness Strategy.</p>	Karen McComish	31-Mar-2009	Completed

<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
DSP-HMR-AP-011 Evaluate, review and (if necessary) revise the adopted HMRI Consultation / engagement	Alan Lunt	Tom Clay	31-Mar-2010	On Target

Progress Summary

<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>
Quarter 2	On Target	90
Quarter 1	On Target	70

Progress

The new Consultation and Engagement Strategy has been finalised and approved.
 2 HMR newsletters have so far been delivered this year.
 10 residents are participating in the education programme.

Issues affecting current/future progress & corrective actions

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<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
Residents participate in a Community Development Education Programme	A HMR OFFICER has set up an Accredited Learning course, to teach resident representatives and allow them to gain a formal qualification. This process feeds the Community Champions process, which has involved these participants to set up and run successful community events. The purpose of the course is to assist build the capacity and confidence of community representatives. To date 10 residents have been recruited onto the course.	Tom Clay	31-Mar-2010	Completed
3 HMR Newsletters provided to all residents	By the second quarter 2 newsletters had been delivered	Neil Davies	31-Mar-2010	On Target
Evaluation of current consultation / engagement protocol with New Heartlands partnership completed	By March 2009, a draft revised Consultation and Engagement Strategy had been developed by NewHeartlands. This has since been the subject of consultation with a residents representatives panel, drawn from across the NewHeartlands Pathfinder. The revised strategy was approved by the NewHeartlands Board during July. This is now being rolled out with all partners. Sefton officers have liaised with Sefton Equalities Partnership, to ensure this new strategy is compatible with Sefton's own Engagement strategy.	Karen McComish	31-Mar-2010	Completed

<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
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<u>Action</u>	<u>Authorising Officer</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
DSP-HMR-AP-012 Contribute towards the adoption of a 'fit for purpose' Corporate Housing Strategy	Alan Lunt	Neil Davies	31-Mar-2010	Completed

<u>Progress Summary</u>		
<u>Period</u>	<u>Action Plan Status</u>	<u>% Complete</u>
Quarter 2	Completed	100
Quarter 1	Completed	100

<u>Activities</u>	<u>Comments</u>	<u>Lead Officer</u>	<u>Deadline</u>	<u>Status</u>
Private Housing Financial Assistance Policy oved	The new Housing Financial Assistance policy was approved by Cabinet on the 9th July.	Robert Cannon	30-Sep-2009	Completed

Agenda Item 12

REPORT TO: Cabinet Member - Regeneration
Cabinet

DATE: 16th December 2009
17th December 2009

SUBJECT: 50 – 64 Stanley Road, Bootle

WARDS AFFECTED: Linacre

REPORT OF: Alan Lunt, Housing Market Renewal Director, 0151 934 4580

CONTACT OFFICER: Lee Payne, Programme Co-ordinator, 0151 934 4842

**EXEMPT/
CONFIDENTIAL:** No

PURPOSE/SUMMARY:

To seek authority to grant a 250-year lease to the Keepmoat Property Ltd, part of the Keepmoat Group for the 50-64 Stanley Road site, and to jointly fund the construction of twelve apartments for social rent and the 5694 sq ft of retail space.

REASON WHY DECISION REQUIRED:

Cabinet has delegated authority with regard to this matter.

RECOMMENDATION(S):

It is recommended that:

- i) Cabinet approves the granting of a Development Licence to the Keepmoat Property Ltd. for the 50-64 Stanley Road site in order to carry out the development of twelve apartments for social rent, and 5694 sq ft of retail space.
- ii) Cabinet approves the granting of a 250-year 'ground lease' for the 50-64 Stanley Road site to Keepmoat Property Ltd. upon the successful completion of the scheme.
- iii) Subject to i) and ii) above, Cabinet approves the use of £885,152 of HMR grant funding in order to jointly fund the construction of the scheme.

KEY DECISION: No

FORWARD PLAN: No

IMPLEMENTATION DATE: Upon expiry of the 'call in period' for the minutes of this meeting

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ALTERNATIVE OPTIONS:

The site was Compulsory Purchased by the Council in order to redevelop the site with a new retail and residential development. There are no viable alternative options other than to leave the site undeveloped which would be contrary to the express purpose of the CPO and the aims of the NewHeartlands Housing Market Renewal Pathfinder Programme.

The Keepmoat Group is the Council's appointed 'lead developer' partner for the HMR programme in the Bedford/Queens area of Bootle. As such the Council has previously entered into an Overarching Development Agreement with the Keepmoat Group until 2017.

This agreement give the Keepmoat Group 'first call' on HMR development opportunities in the Bedford/Queens area, subject to performance and viability.

As an area currently undergoing significant regeneration the low value of retail and residential property in the area currently limits the value of land to the point where a market led mixed-use scheme such is unviable without public sector investment.

IMPLICATIONS:

Budget/Policy Framework:

Specific funding exists within the Housing Market Renewal Capital programme for the scheme. The resources for this initiative were identified within the approved HMR Capital Programme for 2009-10, considered by Cabinet on the 14th May 2009.

Financial:

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<u>CAPITAL EXPENDITURE</u>	2006/ 2007 £	2007/ 2008 £	2008/ 2009 £	2009/ 2010 £
Gross Increase in Capital Expenditure				
Funded by:				
Sefton Capital Resources				
Specific Capital Resources				
<u>REVENUE IMPLICATIONS</u>				
Gross Increase in Revenue Expenditure				
Funded by:				
Sefton funded Resources				
Funded from External Resources				
Does the External Funding have an expiry date? Y/N	When?			
How will the service be funded post expiry?				

Legal: An appropriate legal agreement will be required in order to secure the Council's position in this arrangement.

Risk Assessment: The Project Risk Assessment has been updated and remains acceptable.

Asset Management: N/a

CONSULTATION UNDERTAKEN/VIEWS

The Finance Director (FD 258) and Legal Services Director were consulted in the preparation of this report.

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CORPORATE OBJECTIVE MONITORING:

<u>Corporate Objective</u>		<u>Positive Impact</u>	<u>Neutral Impact</u>	<u>Negative Impact</u>
1	Creating a Learning Community		√	
2	Creating Safe Communities	√		
3	Jobs and Prosperity	√		
4	Improving Health and Well-Being	√		
5	Environmental Sustainability	√		
6	Creating Inclusive Communities		√	
7	Improving the Quality of Council Services and Strengthening local Democracy		√	
8	Children and Young People		√	

LIST OF BACKGROUND PAPERS RELIED UPON IN THE PREPARATION OF THIS REPORT

BACKGROUND:

- 1.1 The Stanley Road corridor forms part of the Housing Market Renewal priority area in the Bedford/Queens area of Bootle.
- 1.2 The poor quality retail, and residential offer provided by the pre-1900 buildings in this area are one of the reasons for the area's decline.
- 1.3 The properties at 50 – 64 Stanley Road were acquired by the Council as part of a Compulsory Purchase Order confirmed by the Secretary of State during 2007, along with the adjoining land at Wadham Park. The businesses that were operating in the properties were relocated to alternative premises in the local area and the properties were subsequently demolished.

DEVELOPMENT PROPOSALS:

- 2.1 The Keepmoat Group, as the Council's appointed 'lead developer' for the area, has put forward a three storey development which comprises 5694 sq ft of retail space on the ground floor and twelve apartments on the upper two floors.
- 2.2 The proposed scheme is complies fully with the Council's masterplan and Supplementary Planning Guidance for the area, and the proposal was granted planning consent in November 2006.
- 2.3 Keepmoat has agreed a 'block disposal' of all twelve of the apartments to Cosmopolitan Housing Association for social rented accommodation. Cosmopolitan Housing Association is part of the Evolve partnership, the Council's appointed 'lead RSL' in the area. The Council will have 100% nomination rights to these properties for a period of 15 years, with priority being given to those residents whose homes are included as part of the HMR redevelopment proposals. The Homes and Communities Agency has allocated a grant to Cosmopolitan Housing Association towards this cost.
- 2.4 The 5694 sq ft of retail space will meet all the requirements demanded by modern retailers and as such it is anticipated that the scheme will attract interest from both new businesses looking for accommodation in the area, as well as existing retailers looking to upgrade to more modern premises, and who might otherwise be forced to relocate out of the Bedford/Queens neighbourhood.

DEVELOPMENT APPRAISAL:

- 3.1 A detailed and robust financial appraisal process has identified that there is a funding deficit of £885,152 which,if not addressed, would make the scheme unviable.
- 3.2 The scheme valuations have been verified by the Council's appointed Surveyor, Capita Symonds, and evidence has been provided by Keepmoat on the preferred tender in order to verify the scheme construction costs.
- 3.3 It is therefore proposed that HMR grant funding is used to jointly fund construction of the scheme.

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4.0 TERMS OF DISPOSAL

- 4.1 The Council will grant Keepmoat a 'Development Licence' in order to allow them to go on site and develop the proposed scheme.
- 4.2 Upon successful completion of the scheme the Council proposes to grant a 250 year 'ground lease' to Keepmoat in exchange for a nominal annual ground rent.

5.0 STATE AID AND LEGAL POWERS

- 5.1 The appointment of Keepmoat was undertaken through OJEU procedures and the scheme construction competitively tendered. State Aid issues therefore do not arise.
- 5.2 The Council has legal powers to enter into this agreement by virtue of section 123 of the Local Government Act 1972.