

## **Appendix B**

# **Bailrigg Garden Village - First public sector led stage to prepare a Development Framework and Delivery Strategy**

## **Draft Project Plan**

### **Summary**

The City Council is leading the delivery of the Bailrigg Garden Village and is commencing with a first stage of project development activity to bring forward the Garden Village, a major development project south of Lancaster city centre incorporating the existing campus of the University of Lancaster.

The Garden Village is to be around 3500 dwellings in size with a range of housing to meet local needs and wider market demands. Homes will be innovative and high quality, low or zero carbon and adaptable to changing lifestyles. Neighbourhoods are to be well designed, reflecting the best qualities of local context, and served by generous and purposed greenspace and, with a good choice of sustainable transport options locally, to the village centre(s), to the University, the city and beyond. The approach is to be inspired by the ethics and principles of the early Garden Cities movement.

The first stage will be to prepare and formally adopt project planning and project Governance arrangements. These will aim to follow the model provided by the Homes and Communities Agency guidance, but adapted to local circumstances. The Bailrigg scheme is probably unique amongst the other Garden Village's in that it already has at its heart one of the district's premier economic drivers in the form of the University of Lancaster campus. Known for its innovation in the field of digital connectivity, environmentally sensitive design, and construction technology the university will pay a vitally important role as an advising partner in the project whilst alongside that the appropriate care will be taken to account for any interests arising from the university's role as a key landowner within the Garden Village.

Following Governance the next step will be to prepare a robust planning policy and delivery framework for development of the Garden Village involving setting spatial parameters for the development, planning key infrastructure and securing landowner and developer buy in to appropriate delivery arrangements. Progress with this stage shall inform the council in its work to bring forward the Lancaster District Local Plan - including at the Examination Stage anticipated from early 2018. The Council is already allocating the site for the Garden Village in its Draft Local Plan intended for submission to the Secretary of State for Examination in Public during 2018.

The council is working to finalise its proposals for the spatial scope of development and for advance and key infrastructure. The spatial scope of the Garden Village is likely to require development across more than 160 hectares of land at Bailrigg and in the vicinity of the Lancaster University campus. Bus rapid transit and a cycle superhighway are to serve the Village and connect between the city and the University.

The council's approach will be to take the strategic lead as Local Planning and Economic Development Authority to ensure that the Garden Village meets its aspirations for the growth agenda it is promoting, and those of the local community it serves. As part of this it will undertake detailed work to prepare for its key role as intelligent client prior to procuring the appropriate external project expertise and consultancy services. In addition, it will work closely with Lancashire County Council on all transport aspects and provision to meet education needs. It also intends to work closely with the University of Lancaster to investigate the opportunities for innovation in design, construction and energy conservation including accessibility to digital services.

The council is to prepare, alongside the Local Plan, a Development Framework Document to set the spatial scope and parameters for the Garden Village and to define key infrastructure. It will procure specialist advice and support in property agency, investment and appraisal and instruct the negotiation of agreements to secure the support and participation of land interests in delivering the Garden Village. It will support and work closely with the county council in planning and bringing forward key transport infrastructure via a joint team(s) led by the county council.

Arrangements will be made to provide for effective partnership working and to establish appropriate governance arrangements for project activities.

## **1. Background and concept for the Garden Village**

Lancaster district has an evidenced need for a further 13,000-14,000 new homes by 2031. By far the largest single housing land allocation in the City Council's forthcoming Deposit Draft Local Plan to meet these needs will be the Bailrigg Garden Village.

The concept as stated in the council's Expression of Interest for the Bailrigg Garden Village is that –

“Bailrigg Garden Village presents the best opportunity in generations to extend Lancaster's strategic housing supply in a manner which respects and reflects the ethical beliefs of the local community about sustainable living, local identity and high levels of connectivity through public transport and cycling.

It will address the long standing 'Town and Gown' challenge of integrating the university campus with the city, in a carefully master planned and themed manner, without simply extending the urban area.

The Garden Village will also assist the University with its aspirations to attract the highest calibre of staff and students to Lancaster by providing a bespoke new residential neighbourhood closely assimilated with the Bailrigg and (Health) Innovation campuses during an unprecedented period of Growth”.

The Government expects a Garden Village to be well designed, high quality and attractive places and to secure this expects local authorities to play an active, enabling role during both planning and delivery stages. This is to involve –

- Leading on developing a vision and planning and design principles to deliver a quality and distinctive place
- Ensuring the meaningful engagement of relevant stakeholders, the community, landowners and developers in helping to inform and shape proposals
- Preparing robust planning policy and guidance to ensure a well-planned and distinctive Garden Village with coordinated and appropriately phased infrastructure

- Preparing a site wide masterplan and guidance to ensure a well-planned and distinctive Garden Village with coordinated delivery
- Provision of key public and private infrastructure to support the Garden Village including to secure strategic transport infrastructure via the county council
- Leading on collaborative work to achieve the Vision

## **2. Project Brief - what the project is to deliver and when**

### **In outline**

The Project is to prepare a Development Framework Document and delivery plan for the Garden Village. The Document will set out how the Village is to be delivered with full arrangements in place to secure satisfactory delivery of infrastructure and development - including through the local planning process and via land mechanisms.

Integral to all the above,

**Delivery Planning** is integral to preparing Document and must -

- Inform the drafting of Local Plan policy and (as above) support the council's case to the Local Plan Examination,
- Secure funding and commitments to infrastructure provision
- Inform the making of arrangements with landowners and developers to secure the appropriate sharing of costs, the timely provision of key infrastructure and services and the proper phasing and build out of quality developments that meet the Vision and Objectives for the Garden Village.

### **Required outputs**

A first draft Development Framework Document is sought by November 2017. This document is to inform policy for the Submission Version of the Local Plan. Subsequent drafts shall further inform and thereby, support the council in preparing its case to the Local Plan Examination that the Garden Village is reasonably deliverable.

A finalised **Development Framework Document** to include an agreed Concept Plan is required by June 2018. This is to:

- Further support the Council's Case at the Local Plan Examination,
- Provide a strong direction and development framework for the masterplans and proposals to be brought forward by landowners and developers - and including the Lancaster University,
- Provide a robust framework by which the council shall consider subsequent planning applications and thereby manage the build out of all development phases.

The project work shall be undertaken in five stages following a short initiation stage. The stages include for stakeholder consultation and community engagement.

### **Alignment to Strategic transport infrastructure**

Essential to the Garden Village and aligned to the project is work by Lancashire County Council to plan and secure funding for the new road connection required to J33 of the M6 and the associated transport hub. The planning and delivery of this infrastructure is interdependent with that for the Garden Village. The project will provide for the collaborative working necessary to help support this

county council led project activity and assure that work on this informs decisions on the Garden Village.

### **3. Project Scope**

The scope of work shall be all that is required to meet the requirements of the Project Brief. Aligned are –

- To develop and implement a clear project plan for the Garden Village from concept to completion.
- To work to deliver the formal allocation of the Garden Village in the Deposited Lancaster District Local Plan.
- To work to secure the required strategic transport infrastructure (closely related but separate from this Project).
- To use ensure that the property interests of the city council as a landowner are used to aid and facilitate the delivery of the Garden Village
- To work to make best use of the specific property and financial interests of any third party landowner and / or developer in the delivery of the Garden Village.

The spatial scope of the project shall take as a starting point the proposed extent for the Garden Village identified in the council's application to DCLG for Garden Village status. This may be adjusted as appropriate to meet the Vision and Objectives for the Garden Village.

The Council will refine and perfect the drafting of policy SG1 of the council's Strategic Policies and Land Allocations DPD. This relates specifically to the strategic allocation of Bailrigg Garden Village through the Local Plan process. The Policy states that once fully completed, Bailrigg Garden Village will accommodate approximately 3,500 dwellings by 2033, plus a number of opportunities for employment and economic growth.

### **4. Arrangements for decision making and project control**

The city council will lead the Project. A partnership led by the council will direct the Project. A Governance Structure is set out in the attached flow diagram. In summary: –

- Strategic Board – of the City Council, the County Council and the HCA. The University of Lancaster University will be a special advisor to the Strategic Board with arrangements in place to separate their corporate and land ownership interests as part of this process.
- Project Board – of City and County Councils chaired by a Project Executive, reporting to the Strategic Board,

Project Team managed by a Lead Officer for project implementation.

The role and responsibilities of the Strategic Board needs to be agreed by the partners and properly understood by all involved. In outline, this Board is to –

- Agree the Vision and objectives for the Garden Village
- Liaise with Government, the HCA, and the LEP
- Assure partnership working between the key partners including with Lancaster University
- Support and help facilitate the county council in all work required to secure the strategic transport infrastructure connection to J33.

- Secure corporate buy in
- Capture new ideas and innovations
- Interface to elected members
- Provide full oversight and scrutiny for project delivery
- Consider and recommend on the models most appropriate (if any) for community ownership and social control inter alia of land, buildings, infrastructure and open space

The Project Board is to –

- Propose a vision statement and objectives for the project.
- Resource project delivery
- Integrate the Project to the Local Plan and recommend on Local Plan Policy
- Liaise with key landowner and developer stakeholders
- Decide arrangements for project delivery
- Secure delivery funding including investigating the potential for capturing land value for reinvesting with the GV community for future years.
- Take responsibility for project delivery and direct the project
- Own project risk

In addition, the Project Board will provide a forum for the detailed liaison between the project and the crucial separate project work led by Lancashire County Council on which the project is dependent to secure the timely delivery of the project critical strategic transport infrastructure connection to J33 of the M6.

## **5. Project approach - capacities, procurement**

### **General approach**

The approach is to lead the Project and act as intelligent Client. Procuring additional project management and external capacity as appropriate and, involving close joint working with key partners such as the County Council. The Governance Structure will enable working at the required levels including strategic partnership working, project control and project implementation.

As stated, essential to the Garden Village delivery project and its management arrangements will be work by Lancashire County Council to plan and secure funding for a strategic transport infrastructure connection to J33 of the M6 and the associated J33 transport hub. This is crucial if the council is to deliver the Garden Village. To secure this work element the City Council propose to cover the reasonable costs of Lancashire County Council in this, from capacity funding.

### **Capacity Challenges**

The City Council is faced with unprecedented circumstances in relation to major corporate regeneration projects. Taking a major Local Plan Examination as a project in its own right there are no less than five major corporate projects taking place at the current time. All of those projects are centred in, and have to be managed by the councils' Regeneration and Planning Service. The Council is considering how at Management Team level it can cover the support needed for these projects alongside corporate management and potential restructuring responsibilities at this time. Options include dedicating exclusive Senior Management capacity to the main projects (linked to their

individual Project Managers) in order to ensure effective delivery from the client control perspective. Those senior managers will need to be back filled in order that service management and development can continue to match the council's other priorities.

There is no option relating to prioritisation of one project over another as the transformational opportunity for Lancaster District is once in a generation.

### **Community and stakeholder engagement**

The Project will involve a significant element of community and stakeholder engagement. This will be led in house and resourced by the Client Project Team with the exception of stakeholder engagement and negotiations as part of delivery planning – see below.

### **Capturing innovation**

The council will look to best practise and exemplars to assist it in planning and bringing forward the Garden Village. It will participate in the Garden Villages Forum and locally has established information sharing arrangements with Fylde Borough Council (Whyndyke Garden Village). Further, it will draw on long standing liaison with University faculties to seek advice and where possible capture new ideas and innovations.

### **Evidencing, spatial planning and preparing the Development Framework Document**

Spatial evidencing, spatial analysis and planning is already being commissioned by the in house client team supplementing the substantial work already in hand by the Housing and Planning Policy Team as part of wider evidencing for the Local Plan. Consultancy support to prepare the Local Plan shall be extended where appropriate to include for the more specific evidencing work required for the Project. This includes for work on all aspects of planning for water and green infrastructure – blue/green planning.

### **Site Transport and Utilities Infrastructure**

The County Council has committed to bringing forward Bus Rapid Transit and a Cycle Superhighway between the city centre and south Lancaster, the university and the junction 33 transport hub. City council officers view decisions on the routing of these and the BRT operation as fundamental to planning the Village and transportation for it.

It is proposed that work on Bus Rapid Transit (BRT), the Cycle Super Highway and site transport infrastructure should be planned and ultimately delivered by consultants led and project managed by the County Council and drawing on drawing on specific capacities from the City Council including particularly in planning for cycling and stakeholder and community engagement. The City Council Client Project Team with its engineering professionals will commission utilities work.

The City Council's Urban Designer will lead on commissioning and client management for the spatial analysis required also drawing on the skills and expertise of professional planners at the Project Board level in creative workshops to analyse, review, challenge and formulate ideas.

The Urban Design professionals will lead in preparing a Draft Design Code. The emerging early content is to help inform planning policy drafting. The finalised Code shall form part of the Development Framework Document.

The Client Project Team, supported by commissioned external capacity will prepare the Development Framework Document. This will inform and support the council's case at Examination,

help set parameters and expectations for master planning and subsequent design work and, inform any SPG and any design controls to be secured through land mechanisms.

### **Landowner engagement and delivery planning**

This critical element of work iterates closely to the spatial planning. The council identifies an urgent need to engage specialist consultancy support to:-

1. Advise on options for a mechanism to share / equalise costs and values and to finance and secure advance and key infrastructure and, the appropriate phasing of development
2. Liaise with multiple private and certain public land interests and including the Lancaster University to advocate for and secure the necessary buy in to the cooperative principles essential to agree a preferred mechanism
3. Lead and negotiate with all relevant land interests to secure landowner and developer agreements to the appropriate mechanism and subject to council authorisation, to document and complete such agreement(s).

The council is already procuring the services required off the HCA framework panels via authorised exceptions to its Contracts Procedure Rules. The consultancy procured will need to work collaboratively with the council to plan and programme the services required.

Note this element of the project shall include for engagement with Lancaster University concerning all aspects of its land and development interests.

In addition, the council sees merit in landowners and developers forming an advisory panel or similar inter alia to assist in informing the council and general liaison and information sharing by the council.

## **6. Project Stages**

The project is to be undertaken in stages. The chart in Appendix 1 summarises.

### **Initiation Stage**

*Complete by end July 2017*

- Set Draft Objectives
- Prepare Project Plan
- Establish Client Project Team

*Complete by end October 2017*

- Cabinet authorisation to Project Plan and Governance structure
- Document Overarching Vision
- Establish Partnership
- Confirm working arrangements with Lancashire County Council re. site transport

### **Stage 1 Spatial Evidencing**

*Complete by end September 2017*

The Stage shall involve assembling all spatial evidencing. This Stage should seamlessly inform Stage 3. Much of the evidencing is already in hand as part of work to prepare the Local Plan. The Project

Team will review all progress and undertake / procure further work as necessary. The table in Appendix 3 summarises the progress and status of evidence and how tasks shall be progressed.

## **Stage 2 Spatial vision (high level)**

*Complete by October 2017.*

This is to help set the Vision and Objectives for the Garden Village and thereby gain some crucial understandings and agree some high level spatial parameters for work at stages 3 and 4. In so doing the stage should help win stakeholder and community support / buy in for the principle of the Village and, most important, help inform the local plan policy for the Village.

The stage would involve –

- A. Stakeholder consultation and community engagement into ambitions and aspirations for the Garden Village
- B. Engagement with Lancaster University to understand its position on key issues
- C. Decisions on council priorities for its local plan policy for the Village

A. This would look into what people want of the Garden Village, what sort of place do people want it to be? Consultation in September / October 2017 would inform decisions on the Vision and Objectives for the Garden Village. Example issues -

- Self-containment. Whether facilities and services should serve just the Village or wider e.g with catchment extending into south Lancaster?
- Village centre. What sort of centre is sought for the Village and where? Should there be one or more centres?
- Whether the Village should fit nestle within the landscape or, at least in part, be arresting / prominent in it?

B. Engagement with Lancaster University about what for it will be corporate (and not land) issues must inform the Vision and Objectives for the Garden Village and inter alia must concern the following -

- How “public” is the University aspiring to be - if the campus is to house the bulk of commercial and community uses this requires significant public access and in perpetuity?
- How would this affect the operation of the University?
- How would the University envisage the movement of people ‘up the hill’?
- Might this require the relocation of some services to a more ‘publicly’ accessible location within the LU campus?
- Would sports and leisure facilities (current and proposed) be made available to the public and, if so, when and on what terms?
- Would the University want to accommodate the main commercial facilities - including one or more supermarkets?
- What are the University’s long term plans for parking provision and management?
- What role might it play in the rapid transit system?
- Might it run its own buses? How important is cycling to the University?
- What are the long term requirements for the Health Innovation Campus? How does this affect City Council land north of Bailrigg Lane? What are the current phasing timetable/uses planned for Phases 2 and 3. What supporting infrastructure needs to be planned prior to delivery of these phases? What health and health related services to the community might be offered via the Centre as a hub?

C. The council must decide what priorities it attaches, inter alia, to –

- Meeting affordable housing need and so requirements
- Meeting demand for playing field space
- Meeting existing unmet needs for community space and services
- Needs for bespoke intermediate care facilities for elderly people
- Low carbon build
- Low carbon heat networks
- Secure housing that is readily adaptable to changing household needs
- Shared education / community use of school facilities, play space etc

### **Stage 3 Spatial Planning (1)**

*Complete by December 2017*

This stage shall involve analysis and synthesis of evidence to prepare a **first Draft Development Framework Document**. This will -

- A. Plan the spatial scope of the land that is to be developed and that to be reserved from development (blue/green land) to
- Manage water, minimise flood risk and provide for attenuation and, if appropriate mitigation.
  - Safeguard, conserve and enhance wildlife habitats
  - Respect landscape character and form, views and openness
  - Conserve the historic environment
  - Assure any significant archaeological interest can be satisfactorily preserved
  - Plan for noise

The work is to be informed by all preliminary and strategic studies and evidencing at Stage 2, including a land use review, utilities understanding and geotechnical reporting

B. Plan for Transport and Utilities Infrastructure with work to identify the requirements / options for

- Utilities
- BRT and synergy with a Transport Hub served by new J33
- Strategic cycling infrastructure (cycle super highway)
- Principal highway servicing
- Low carbon heat networks
- Ultra-Low Emissions/Electric Charging Points
- Car Parking Hierarchy/Methodology

C. Plan for Community Facilities and Services with work to identify the requirements / options inter alia for

- Local centre(s) and community facilities (including formal education and secondary school, p.o.s, culture and leisure, healthcare including digital healthcare)
- Likely distribution/siting of Employment-Generating Uses including phasing of the HIC.
- Affordable housing requirements

- Retail uses

D. Draft Design Code. Drafting of the Code should at strategic level inform the Local Plan Policy requirements, then at detailed level set the design approach and detailed design requirements for

- Development structure
- Health and Wellbeing Plan
- Transport servicing
- Drainage including SUDs
- Pedestrian access and movement
- Townscape / densities
- Lighting
- Public realm and public art trails
- Build typologies
- Build standards (in outline) including zero-carbon building technologies.
- Build innovation and liveability including self-build and off site modular / kit construction
- Design palette
- Architecture
- Local services provision e.g allotments, for children's play

A consistent thread through the Design Code will be that sustainability considerations are embedded including that innovations and measures are robust in the face of likely economic, societal and environmental change. To example, to avoid encouraging even requiring technologies that work today but not tomorrow.

Setting out these standards at an early stage, interwoven into the Local plan policy for the site will be essential to avoid unrealistic expectations by developers about standardisation, land values and build costs.

#### **Stage 4 Spatial Planning (2)**

*By June 2018*

As informed by work at stages 1, 2 and 3 to

- A. Identify and prepare draft concept options, for the spatial disposition of development and routing (in outline) of key site transport infrastructure. The concept options together with all necessary evidence and detailing are to be presented in a draft report.
- B. Consult on the draft concept options
- C. Agree a preferred concept option (City Council).
- D. Prepare and finalise the Development Framework Document focused on the agreed Concept Plan and, to incorporate the finalised Design Code.

This work to be structured draw on professional inputs from a Review Panel comprising persons at the Project Board level and, to be closely informed by delivery planning as per the below.

#### **Stage 5 Delivery Planning**

*By June 2018*

A stage or perhaps better termed a stream of activity running parallel to stages with 3 – 4 and prospectively continuing further.

This stage should move the project from the existing position - where there is strong landowner / developer appetite to develop housing at sites in the location - to one where there is buy in to the vision and objectives of the Garden Village. The aim is agreement(s) with landowners and / developers inter alia to share in the costs / equalise costs to provide key infrastructure including strategic transport infrastructure (and specifically for which 10% of the funding must be secured locally).

The above taken together with knowledge and understanding of all infrastructure requirements is to inform viability appraisal that in turn iterates closely with work by the city council as planning authority to set its planning requirements including any S106 contributions required.

As stated the council will procure specialist support in delivery planning and, guided and advised by this support will prepare a stage plan for the sequencing of work by which the appropriate arrangements and mechanisms might be secured. Prospectively and as recommended by HCA the stage may involve activity and negotiations in the sequence to a) secure buy in to key principles b) establish viability C) agree heads of terms (HoT) with landowners and developers and d) memoranda of understanding (MoU). This stream of work is crucial to support the council's case at the Local Plan examination that the Village is deliverable.

## **11. Estimated Project Costs**

The table below gives very preliminary outline budget estimates for all work required in project stages 2 – 5 and requiring new expenditures by the council.

<b>New work elements required involving new expenditures not otherwise to be met in-house by the city council</b>	<b>Cost estimate 2017/18 (confirmed)</b>	<b>Cost estimate 2018/19 (to be bid for)</b>
BRT/Cycle/Site Transport Sub Team – project management revenue costs (Lancashire County Council)	£15k	£10k
Strategic infrastructure - project management and funding revenue costs (Lancashire County Council)	£30k	£30k
Community and stakeholder engagement (all stages)	£10k	
Further consultancy support – spatial evidencing	£30k	£20k
Additional Regeneration Team capacity in information and data collation, management and dissemination including via spatial mapping (city council new temporary post)	£25k	£30k
Specialist consultancy support – advice on viability, delivery options and mechanisms, development negotiation and delivery – including in land valuation, surveying, negotiation and legals	£100k	£100k
Not yet allocated	£20k	£40k
<b>Estimates total</b>	<b>£230 k</b>	<b>£230 k</b>

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## Appendix 1 Work Stage Planning

The chart below summarises.

