

Matter 20- Monitoring

Issue – Whether the Monitoring Framework for the Plan is justified, effective and consistent with national policy?

20.1 Does the monitoring framework in Chapter 18 provide an effective mechanism for monitoring all of the policies in the Local Plan?

- 20.1.1 The monitoring framework outlined in Chapter 18 has been based on the approach to monitoring underpinning the Core Strategy, which has been used as the baseline for Annual Monitoring Reports since adoption in 2013.
- 20.1.2 The relative successes, and failures, of the Core Strategy monitoring approach have been considered throughout the production process of the new Copeland Local Plan. These considerations have been incorporated through the addition of new or revised monitoring targets.
- 20.1.3 The Annual Monitoring Report process has highlighted key areas that require additional, or more sensitive, forms of monitoring. These absences throughout the Core Strategy period have been reflected within the production of the Copeland Local Plan, regarding its policies and the monitoring criteria that are subsequently attached to them.
- 20.1.4 Paragraph 18.1.2 of the Local Plan Publication Draft (CD1) notes that *“Monitoring will take an objective-led approach to the selection of targets and indicators, which will help provide a consistent basis for monitoring the performance of the strategy against the objectives. Where appropriate, the Local Plan will set targets for each policy, and will set out how the policy will be implemented and monitored. Specific targets have been included where clear outputs may be required. The monitoring criteria should be read alongside the relevant plan policy for a full understanding.”*
- 20.1.5 Objectives, targets and indicators have been identified for the majority of the policies within the Local Plan. These are shown in Table 18 of the Publication Draft, pages 247 onwards. In some cases however it has not been possible to identify indicators or targets and this is noted within the table. This could be because monitoring data is not collected or because when monitoring the Core Strategy, it was found that indicators were reliant on third parties and were less reliably accessible.
- 20.1.6 The monitoring rationale underpinning the Copeland Local Plan also reflects the relevant indicators and returns necessitated by government requirements. This include for example indicators relating to the amount and type of houses built annually. The Council believes this new approach to monitoring will be a effective mechanism for monitoring the delivery of the Copeland Local Plan.
- 20.1.7 Given the above the monitoring framework is considered to provide an effective mechanism for monitoring the majority of policies within the Local Plan where information is available for collection without placing unnecessary burdens upon the Council.

20.2 Are the indicators and targets sufficiently precise to measure the performance of the Local Plan?

20.2.1 The Council has produced precise indicators and targets that will help monitor the performance of the Local Plan. The progress against such targets will be reported through the Annual Monitoring Reports.

20.3 Are there clear contingencies in place to address any issues arising from the monitoring process, such as non-delivery or lower delivery of housing and employment allocations in the Local Plan? Are suitable arrangements in place for reviews of the policies (either separately or as part of the wider plan) in a timely manner?

20.3.1 Paragraph 33 of the NPPF states:

“Policies in local plans and spatial development strategies should be reviewed to assess whether they need updating at least once every 5 years, and should then be updated as necessary²⁰. Reviews should be completed no later than 5 years from the adoption date of a plan, and should take into account changing circumstances affecting the area, or any relevant changes in national policy. Relevant strategic policies will need updating at least once every 5 years if their applicable local housing need figure has changed significantly; and they are likely to require earlier review if local housing need is expected to change significantly in the near future.”

20.3.2 Consequently, the NPPF highlights the necessity of reviewing relevant strategic policies under specific circumstances. An effective monitoring system is essential to secure this. The monitoring process, alongside broader external factors such as the delivery of a growth scenario, can highlight inefficiency within the delivery of the local plan. For instance, within policy H3PU:

“If evidence suggests that, at the end of any monitoring year, housing delivery has exceeded expectations within the Sustainable Rural Village and Rural Village tiers in the settlement hierarchy which may put the overall Development Strategy at risk the Council will consider carrying out a full/partial Local Plan Review”

20.3.3 Likewise, such review triggers and commitments are also outlined in the supporting text:

“13.5.2 The Council will review its 5-year housing land supply position annually as well as reviewing the location and type of housing coming forward through the Annual Monitoring Report.”

20.3.4 These commitments ensure that the Local Plan has clear contingencies in place, through the utilisation of effective review mechanisms, to ensure any issues documented through the reviewing process are effectively engaged with to ensure the provision of sustainable development.