



# PLANNING OBLIGATIONS

2013 to 2014



CARLISLE  
CITY COUNCIL



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# Introduction

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Carlisle Planning Services have been implementing S106 Agreements since they were introduced in 1991 and to date have entered into nearly 300 agreements in place (including Deeds of Variation<sup>1</sup>).

This annual report gives an overview of S106 agreements (and Unilateral Agreements<sup>2</sup>) entered into over the last year and give an update on the delivery of the obligations within those and previous years. It is intended to update members, developers and members of the public of the implementation of obligations so it can be seen how they have a direct positive impact for the District and therefore its residents.

A S106 is a legal agreement between the planning authority and the applicant/developer, and any others who might have an interest in the land.

They can cover a range of commitments which are enforceable against all the parties concerned and any subsequent owner of the site. It is therefore important that all agreements are monitored to ensure compliance and ensure timely delivery by all parties and avoid the possibility of enforcement action being taken by one party on another.

Government policy was set out in Circular 5/05 which was listed in Annex 3 as a document replaced (but not the associated guidance) by the National Planning Policy Framework in March 2012. Paragraph 204 states:

***“Planning obligations should only be sought where they meet all of the following tests:***

- necessary to make the proposed development acceptable in planning terms;***
- directly related to the proposed development; and***
- fairly and reasonable related in scale and kind to the development.”***

These tests are unchanged from when Community Infrastructure Levy came into force in April 2010 when it became unlawful for a planning obligation to be taken into consideration when determining a planning application for a development, or any part of a development, that is capable of being charged the Levy, whether there is a local levy in operation or not, if the obligation did not meet all of these tests.

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<sup>1</sup> Deed of Variation where there is a change to the original agreement which may or may not have a material change to its delivery.

<sup>2</sup> A unilateral agreement is where only one party makes an express promise, or undertakes a performance without first securing a reciprocal agreement from the other party. Such agreements are marked with an asterisk by way of identification throughout this document.

# Summary 2013 to 2014

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## 19 S106's were entered into with the potential to deliver:

### *Housing*

- 95 Affordable Dwellings plus those for which a scheme has yet to be submitted.

### *Commuted sums in lieu of on-site Affordable Housing Provision*

£34,000 has been negotiated, but a further 10 agreement are formula based and reflect market value of the properties built.

### *Financial*

A total of £1,200,033/£1,194,666 has been negotiated, and excludes formula based calculations for affordable housing and education which will be determined at time of payment.

Of the sum quoted £430,428/£425,061 is payable to the County Council for Highways, Education, School Transport and Travel Plans. The balance is due to the City of Carlisle of which includes £470,375 is for the provision/enhancement and maintenance of Public Open Space and Children's Play Areas (some of which may be provided by the developer in lieu of payment), £185,000 for infrastructure initiatives and £65,000 for wildlife mitigation initiatives.

\* \* \* \* \*

## During the year delivery via S106 obligations has achieved:

### *Housing*

40 Affordable Dwellings, including 5 in the rural area.

### *Financial*

£562,868 has been **received** for a variety of dedicated projects for the provision and maintenance of Public Open Space/Children's Play Areas plus cycleways and infrastructure projects.

\* \* \* \* \*

Balances of monies [rounded] held to complete undertakings as detailed within S106 agreements and unilateral agreements as at 31 March 2014:

In Lieu of on-site Affordable Housing	£ 15,000
Cycleway and Public Realm	£ 732,841
Open Space and Children's Play Areas, provision of and/or maintenance	£ 648,803
Transport and Pedestrianisation	£ 474,755
<b>Total</b>	<b>£1,871,399</b>

NB: Failure to evidence that monies have been spent for the purpose for which it was delivered and within the requisite timescale, will result in the monies having to be returned to the developer.

# New Agreements 2013 - 2014

## Planning Permissions granted subject to a S106 Agreement:

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Overview
11/0279	11/04/13	Lancaster Roman Catholic Diocesan Trustees Registered	Site of former Catholic Church of our Lady of Good Council, Burn Street, Longtown <b>Parish - Athuret</b>	Demolition Of Catholic Church Buildings And Garages And Erection Of 9no. Dwellings With Associated Parking	<b>Affordable Housing Financial Contribution:</b> Contribution payable upon first occupation of the relevant unit. Formula: (Market Value x 0.1) x 0.30
12/0678	16/04/13	Personal Covenant	Land between Lomond and Gladsmui, Broomfallen Road, Scotby, <b>Parish - Wetheral</b>	Erection Of 3No. Detached Dwellings	<b>Affordable Housing Financial Contribution:</b> Contribution payable upon first occupation of relevant unit. Formula: (Market Value x 0.1) x 0.3
12/0811	26/04/13	Personal Covenant	Land adj Garth House, Greenfield Lane, Brampton <b>Parish - Brampton</b>	Erection Of 5no. Dwellings	<b>Affordable Housing Financial Contribution:</b> Contribution payable upon first occupation of the 3 <sup>rd</sup> relevant unit (for 3 units) and 5 <sup>th</sup> relevant unit (for last 2 remaining units). Formula: (Market Value x 0.1) x 0.3
12/0854	06/06/13	Personal Covenant	Adj Scaurbank, Netherby Rd, Longtown <b>Parish - Athuret</b>	Erection Of 14no. Dwellings (Including 3no. Affordable Dwellings)	<b>Affordable Housing:</b> Plots 1,2,10 @ 70% OMV. <b>Open Space:</b> £23,954 payable on the completion of the 8th Unit
10/0760	25/06/13	Personal Covenant	Helme Farm, Cumrew, Brampton, CA8 9DD <b>Parish - Cumrew</b>	Conversion Of Barns To Form 5no. Dwellings	<b>Affordable Housing Financial Contribution:</b> £34,000 payable in instalments of £6,800 within 4 months of completion of each dwelling
12/0710	06/08/13	Personal Covenanting Parties	Rear of Scotby Green Steading <b>Parish- Wetheral</b>	Erection Of 45no. Dwellings, Associated Open Space And	<b>Affordable Housing:</b> 4 @ 70% OMV (1 x 2 bed; 3 x 3 bed) 3 for Affordable Rent (3 x 2 bed)



PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Overview
		indemnified by developer Story Home Limited and Cumbria County Council		Infrastructure	<p><b>OPEN SPACE</b> Not to occupy any units abutting an area of open space until an Open Space Management Scheme has been submitted &amp; approved by the Council</p> <p><b>REFUSE BIN CONTRIBUTION</b> Pay £1,500 prior to the occupation of any residential unit.</p> <p><b>LEAP</b> Pay £50K prior to the occupation of 20 units.</p> <p><b>PRIMARY SCHOOL CONTRIBUTION [COUNTY]</b> Pay £132,561 (indexed) prior to the occupation of 20 units for Primary School Improvements [Scotby School 11 places] OR Primary School Travel costs for 11 pupils for 10 years.</p>
12/0900	30/10/13	Personal Covenant and Pallisterco Limited	St Edmunds Social Centre, Newlathes Avenue, Morton, Carlisle <b>Ward - Morton</b>	Demolition Of Former St Edmunds Social Centre And Redevelopment Of Site With 14No. Dwellings And Associated Parking	<b>Affordable Housing:</b> Plot No 5 - Tenure Discounted @70% OMOV OR Rented at 70% of market Rent
13/0562	04/11/13	Magnus Homes Limited & Cumberland Building Society	Rear of Lime House, Wetheral <b>Parish- Wetheral</b>	Erection Of 6no. Dwellings And Associated Parking, Engineering Works And Landscaping	<p><b>Affordable Housing Financial Contribution:</b> Contribution payable upon practical completion of the 4<sup>th</sup> relevant unit (for all 6 units) Formula: (Market Value x 0.1) x 0.3</p> <p><b>Waste Management Scheme</b> To be submitted prior to first occupation</p>
13/0450	28/11/13	Personal Covenant	West of Quarry House, Wetheral Pastures, Carlisle, CA4 8LE <b>Parish- Wetheral</b>	Erection Of 3no. Detached Dwellings & Garages	<p><b>Affordable Housing Financial Contribution:</b> Contribution payable upon 1<sup>st</sup> Occupation of 2<sup>nd</sup> relevant unit Formula: (Market Value x 0.1) x 0.3</p>
13/0224	19/12/13	Personal	Adj Gran View,	Erection Of 2no. Detached	<b>Affordable Housing Financial Contribution:</b>

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Overview
		Covenant	Cargo, CA6 4AW <b>Parish – Kingmoor</b>	Dwellings (Outline)	Contribution payable upon first occupation of relevant unit. Formula: (Market Value as at practical completion date x 0.1) x 0.3
12/0610	19/12/13	Personal Covenant and Cumbria County Council	Hadrian's Camp, Houghton Road, CA3 0LG <b>Parish – Stanwix Rural</b>	Residential Development (Outline - 3 yr)	<p><b>Affordable Housing:</b> To submit an affordable housing scheme prior to commencement</p> <p><b>Open Space:</b> To submit and obtain council's approval to Open Space Management Scheme prior to commencement</p> <p><b>Wildlife Mitigation/Contribution:</b> £65K [index linked] payable on or before commencement</p> <p><b>Education Contribution - COUNTY:</b> Prior to occupation of 15th unit, confirm the Education Contribution Prior to Occupation of the 20th unit Pay Contribution [either £204,867 Primary School Improvement Cost OR £199,500 Primary School Travel Cost]</p> <p><b>Travel Plan - COUNTY:</b> Prior to Commencement obtain approval of the Plan and appoint a Travel Plan Co-ordinator. £6,600 Travel Plan Administration Fee [indexed] payable prior to 1st Occupation of any unit £54,600 Travel Plan Contribution [indexed] payable prior to 1st Occupation of any unit</p>
13/0047	15/01/14	Story Homes Ltd	Buck Bottom Farm, Burgh by Sands, CA5 6AN <b>Parish – Burgh by Sands</b>	Erection Of 3No. Dwellings, Conversion Of Barn To 1No. Dwelling	<p><b>Affordable Housing Financial Contribution:</b> Contribution payable upon practical completion of the 3<sup>rd</sup> relevant unit (for all 4 units) Formula: (Market Value x 0.1) x 0.3</p>

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Overview
12/0878	31/01/14	Story Homes Ltd and Personal Covenants and County Council	Land between Townhead Road and Station Road, Dalston <b>Parish – Dalston</b>	Erection Of 121no. Dwellings, Associated Open Space And Infrastructure	<p><b>Affordable Housing:</b> 8 Low cost 12 Rented</p> <p><b>Recreation Contribution</b> £115,586 payable prior to occupation of 10 units</p> <p><b>Open Space:</b> Submit Open Space Management scheme for approval prior to occupation of 10 units Transfer the relevant open space to a Management Company upon the issuing of the Open Space Final Certificate being issued by the Council</p> <p><b>Refuse Bin Contribution</b> £3,780 payable prior to first occupation.</p> <p><b>Education Contribution - COUNTY:</b> Formula based contribution payable prior to occupation of 10 units.</p> <p><b>Travel Plan - COUNTY:</b> £6,600 Monitoring Fee payable upon commencement of the development Prepare &amp; agree Interim Travel Plan 3 months prior to occupation of 1st unit</p>
12/0793	12/03/14	Cumbria County Council and Personal Covenants and Story Homes	Hammonds Pond, Oaklands Drive, Durdar Road, Carlisle <b>Parish – St Cuthberts Without</b>	Erection Of 318no. Dwellings	<p><b>Affordable Housing:</b> 35 Low cost [6 x 2 bed apts; 4 x 2 bed house; 23 x 3 bed; 2 x 4 bed] 31 Rented [6 x 2 bed apts; 8 x 2 bed house; 15 x 3 bed; 2 x bed]</p> <p><b>Open Space &amp; The Upperby Park Extension</b> Submit &amp; obtain council's approval to Open Space Management Scheme for each phase prior to occupation of 1st unit of that phase. Following the issue of the Open Space Final Certificate by the council to transfer the land to a Management Company.</p>



PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Overview
					<p><b>Upperby Improvements/Contribution:</b>  Prior to 1st occupation to have submitted Upperby Notice setting out which contributions will be paid and which works will be undertaken by covenanting parties.  prior to occupation of 30% of dwellings [95]  Upperby Footpath Contribution £185K  Footpath Diversion and Lighting t be substantially completed  prior to occupation of 50% of dwelling [159]  Upperby Football Pitched Contribution £40K  Park and Play Facilities Contribution £133K  Upperby CCTV Contribution £10K  Football Pitch Drainage Improvements, the Skate Park and Play Facilities Improvements and/or the CCTV alterations/improvements to be substantially completed.</p> <p><b>Refuse Bin Contribution</b>  To have purchased and delivered appropriate wheeled refuse bin prior to 1st occupation.</p> <p><b>Education Contribution - COUNTY:</b>  £179,550 payable prior to occupation of 20 units</p> <p><b>Travel Plan - COUNTY:</b>  £13,200 monitoring fee payable upon commencement</p> <p><b>Transport - COUNTY:</b>  £10K payable prior to occupation of 20 Full Market Units  [NB All Payments Index Linked]</p>
13/0496	06/03/14	Personal Covenant	Land to the east of Village Green Brunstock <b>Parish – Stanwix Rural</b>	Erection Of 3no. Dwellings	<p><b>Affordable Housing Financial Contribution:</b>  Contribution payable upon 1<sup>st</sup> occupation of the 2<sup>nd</sup> relevant unit.  Formula: (Market Value x 0.1) x 0.3</p>

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Overview
13/0787	24/03/14	Personal Covenant	Land at Orchard Gardens, Houghton, CA3 0LH <b>Parish – Stanwix Rural</b>	Residential Development Of Approximately 6no. Bungalows (Outline)	<b>Affordable Housing Financial Contribution:</b> Contribution payable upon 1 <sup>st</sup> occupation of the relevant unit. Formula: (Market Value x 0.1) x 0.3
13/0655	24/03/14	Top Notch Contactors Ltd and Svenska Handlebanken AB (Publ)	Former Dairy Site, Holywell Crescent, Botcherby, Carlisle, CA1 2TD <b>Ward – Botcherby</b>	Residential Development (Outline Application)	<b>Wheeled Refuse Bins:</b> to have secured the purchase and delivery of wheeled refuse bin for each unit (standard specified) prior to 1st occupation of any unit <b>Sports &amp; Play Provision Contribution Capital Element:</b> £71,892 (index linked) to be paid prior to 1st occupation of any unit <b>Sports &amp; Play Provision Contribution Maintenance Element:</b> Pay 50% = £17,973 [index linked] to be paid prior to 1st occupation of any unit Pay 50% = £17,973 [index linked] to be paid prior to 1st occupation of 30th unit
13/0792	26/03/14	Personal Covenants	land to rear of The Whins & adj to Sewage works, Allenwood, Heads Nook [part field 1717] <b>Parish – Wetheral</b>	Residential Development (Outline)	<b>Affordable Housing Financial Contribution:</b> Contribution payable upon 1 <sup>st</sup> occupation of the relevant unit. Formula: (Market Value x 0.1) x 0.3
13/0762	27/03/14	Personal Covenants	land to the east of Croftlands, Allenwood, Heads Nook <b>Parish – Hayton</b>	Residential Development (Outline)	<b>Affordable Housing:</b> 1 Low Cost @ 70% OMV

## Deed of Variation with Material Change

12/0103	16/09/13	Oakmere Homes Limited	Former Sawmill Site, Netherby Road, Longtown <b>Parish – Arthuret</b>	Residential Development	<b>Affordable Housing:</b> Affordable rented dwellings- <b>reduction</b> from 10 to 5
12/0495	03/01/14	Story Homes Ltd	Crindledyke, Carlisle	Residential Development	<b>Open Space Maintenance Sum:</b> <b>Has been Deleted along with the Schedule of Rates</b> <b>ADD 'Management Company' - defined Second Schedule</b>
12/0383	26/04/13	Citadel Estates Ltd	Former George Public House. Warwick Bridge	Mixed Development including retail & housing	<b>Affordable Housing:</b> Affordable discounted dwellings- <b>reduction</b> from 3 flats and 1 house to 3 houses

## Summary of Obligations Entered into:

### Financial – Commuted Sums - 2013 to 2014

Open Space/Play Areas/ Sports Facs	CCTV	In Lieu of On-Site Affordable Housing	Refuse	Infrastructure Improvements (City)	Transport (County)	Travel Plan (County)	Education (County)	Parish/Ward
		Formula						<b>Arthuret</b>
		Formula						<b>Wetheral</b>
		Formula						<b>Brampton</b>
£23,954								<b>Arthuret</b>
		£34,000						<b>Cumrew</b>
			£1,500					<b>Wetheral</b>
£50,000							£132,561 <b>OR</b> travel costs	<b>Wetheral</b>
		Formula						<b>Wetheral</b>
		Formula						<b>Kingmoor</b>
£65,000 (wildlife mitigation)						£6,600 Admin Fee + £56,600	£204,867 <b>OR</b> £199,500	<b>Stanwix Rural</b>

Open Space/Play Areas/ Sports Facs	CCTV	In Lieu of On-Site Affordable Housing	Refuse	Infrastructure Improvements (City)	Transport (County)	Travel Plan (County)	Education (County)	Parish/Ward
		Formula						Burgh by Sands
£115,586 <sup>3</sup>			£3,780			£6,600 Admin Fee	Formula	Dalston
£ 40,000 <sup>4</sup> £133,000	£10,000			£185,000	£10,000	£13,200 Admin Fee		St Cuthberts Without
		Formula – 2 developments						Stanwix Rural
£107,838								Botcherby
		Formula						Wetheral
		Formula						Hayton
<b>£535,375</b>	<b>£10,000</b>	<b>£34,000</b>	<b>£5,230</b>	<b>£185,000</b>	<b>£10,000</b>	<b>£83,000</b>	<b>£337,428/ £332,061</b>	

## Non financial 2013 to 2014

### Affordable Housing

	Social Rented	Discounted	Parish/Ward
Scaurbank, Netherby Rd, Longtown [DOV]		-5	Arthuret
Former George @ Warwick Bridge [DOV]		-1	Wetheral
Scotby Green Steading	3	4	Wetheral
St Edmunds Social Centre	1 <sup>5</sup>		Morton
Hadrians Camp, Houghton <sup>6</sup>			Stanwix Rural

<sup>3</sup> Provision and maintenance of children's play space and sports facilities

<sup>4</sup> Works may be undertaken by Developer in lieu of contributions

<sup>5</sup> Private Discounted Rented

<b>Social Rented</b>	<b>Discounted</b>	<b>Parish/Ward</b>
12	8	<b>Dalston</b>
31	35	<b>St Cuthberts Without</b>
	1	<b>Hayton</b>
<b>47</b>	<b>42</b>	<b>89 + scheme to be submitted on Hadrians Camp</b>

Persons restrictions within the agreements

Management Plans

# Delivery of Obligations 2013 to 2014

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## BY DEVELOPERS TO CARLISLE CITY COUNCIL

### Non Financial

#### *Affordable Housing*

	<b>Social Rented</b>	<b>Intermediate Rented</b>	<b>Shared Ownership</b>	<b>Discounted</b>	<b>Parish/Ward</b>
St Elizabeths	11				<b>Harraby</b>
Alexandra Drive (Barley Edge)				2	<b>Wetheral</b>
West Of Garden Village (Brackenleigh)	9			10	<b>Cummersdale</b>
Spice Enterprise		2			<b>Belah</b>
Former Sawmill, Longtown				5	<b>Arthuret</b>
St Edmunds, Social Centre, Newlaithes Ave		1			<b>Morton</b>
	<b>20</b>	<b>3</b>		<b>17</b>	<b>40</b>

*It should be noted these figures are for the delivery of affordable housing through S106 agreements. A further 12 Social Rented Properties have been delivered via the planning system by Housing Associations without entering into a S106 agreements.*

#### *Occupancy Clauses*

All affordable housing is subject to Qualifying Status

#### *Land Transfer*

None Transferred



## Financial

### *Payments Received by Carlisle City Council*

<b>S106 Agreement</b>	<b>Amount</b>	<b>Purpose</b>	<b>Parish/Ward</b>
Spice Enterprise	£ 9,973.71	Maintenance and enhancement of offsite open space provision	<b>Belah</b>
Crindledyke	£ 25,000	Highways Improvements 1 <sup>st</sup> contribution	<b>Stanwix Rural</b>
	£ 10,000	Highways Improvements 2 <sup>nd</sup> Contribution	
	£281,000	Transport Improvements 2 <sup>nd</sup> Contribution	
	£ 11,125	Travel Plan Administration Fee	
Watts Yard	£ 39,790	2 <sup>nd</sup> Tranche towards River Petteiril Cycle Route	<b>St Aidans</b>
The Racecourse	£ 24,800	Contribution towards Currock Link [being paid in Instalments]	<b>Dalston</b>
Pennine View	£ 3,570.75	Unilateral agreement re maintenance of 2 parcels of land Parkland Village/Carleton Grange	<b>Dalston/Harraby</b>
Alexandra Drive (Barley Edge)	£ 93,440.08	Open Space Contribution	<b>Wetheral</b>
	£ 50,669.37	Open Space Maintenance Contribution	
	£ 13,500	Highways Contribution [Footpath]	
	<b>£562,868.91</b>		

## Carlisle City Council - Financial

### *Affordable Housing*

<b>Planning Application Location</b>	<b>Commitment</b>	<b>Original Sum</b>	<b>Summary of Works Undertaken 13/14</b>	<b>Amount Spent 13/14</b>	<b>Balance Outstanding</b>	<b>Expiry date of funds</b>	<b>Parish/Ward</b>
WI Hall, Brier Lonning, Hayton	To support delivery of affordable housing	£15,000	Underwrite Education contribution @ Cumwhinton	£14,082	£ 980	April 2021	<b>District</b>

Planning Application Location	Commitment	Original Sum	Summary of Works Undertaken 13/14	Amount Spent 13/14	Balance Outstanding	Expiry date of funds	Parish/Ward
The Sheiling, Meadow View, Cumwhinton	Provide school transportation due to lack of capacity at Cumwhinton School	£14,082 <sup>7</sup>	No primary school aged children being transported	Nil	£14,082	Dec 2017	Wetheral
				<b>£14,082</b>	<b>£15,000</b>		

### *Open Space/Play Areas*

Planning Application Location	Commitment	Original Sum	Summary of Works Undertaken 13/14	Amount Spent 13/14	Balance Outstanding	Expiry date of funds	Parish/Ward	Finance Ref
The Beeches, Wigton Road	Maintenance of Play Area	£10,000	Weekly checks of play area and maintenance	£ 1,000	£ 2,000	2016	Yewdale	11005
Holme Head Bay*	Maintenance of Public Open Space.		Regular routine grounds maintenance	£ 600	£ 3,600	N/A	Denton Holme	11006
Scotby Road, Scotby*	Maintenance of Public Open Space		Amenity grass land & play area maintenance	£ 1,630	£ 3,110		Wetheral	11007
Windsor Way*	Maintenance of Play Area		Weekly checks of play area and maintenance	£ 600	£ 3,600		Stanwix Rural	11008
Walkmill, Warwick Road*	Maintenance of Play Area within vicinity of the site		Football pitch maintenance and replacement goal posts	£ 2,310	£13,860		Botcherby	11009

<sup>7</sup> Internal transfer of monies.

Planning Application Location	Commitment	Original Sum	Summary of Works Undertaken 13/14	Amount Spent 13/14	Balance Outstanding	Expiry date of funds	Parish/Ward	Finance Ref
Wakefield Road, Lowy Hill	Maintenance of Play Area - Moorville Drive	£10,000	Weekly checks of play area and maintenance	£ 1,000	£ 6,000	Dec 2019	<b>Belah</b>	11010
Turnstone Park	Maintenance of Play Area	£10,000	Weekly checks of play area and maintenance	£ 1,000	£ 2,900	Sep 2020	<b>Belle Vue</b>	11011
Jocks Hill, Brampton*	Maintenance of Public Open Space		Weekly checks of play area and maintenance	£ 268	£ 1,070		<b>Brampton</b>	11012
Greenfield Lane, Brampton*	Maintenance of Public Open Space		Weekly checks of play area and maintenance. Regular routine grounds maintenance	£ 3,898	£ 6,102		<b>Brampton</b>	11014
Burgh Road	Provision & maintenance of off site pitches & open space	£45,354.30	Weekly checks of play area and maintenance. Regular routine grounds maintenance. Football pitch line marking & replacement goal posts	£ 4,535	£10,158.30	Sep 2019	<b>Belle Vue</b>	11016
Former Cavaghan and Gray, London Road, Carlisle	Recreational facilities associated with 3 Rivers Strategy or improvements at community centre	£137,500	Weekly checks of play area and maintenance.	£ 2,673	£ 75,077	Sep 2020	<b>Harraby</b>	11017
Harraby Methodist	Maintenance of Play Area	£ 5,670	Weekly checks of play area and	£ 555	£ 3,335	May 2014 5 yrs from	<b>Harraby</b>	11018

Planning Application Location	Commitment	Original Sum	Summary of Works Undertaken 13/14	Amount Spent 13/14	Balance Outstanding	Expiry date of funds	Parish/Ward	Finance Ref
Church, Cumwhinton Road, Carlisle			maintenance.			start		
Tribune Drive *	Remedial work and 10 year maintenance of Public Open Space	£20,025	Regular routine grounds maintenance.	£ 1,800	£ 10,800	Jul 2019	Stanwix Rural	11019
Heysham Park, Raffles	Maintenance of Public Open Space	£25,000	Weekly checks of play area and maintenance. Regular routine grounds maintenance.	£ 2,500	£15,000		Belle Vue	11021
Parkland Village, Garlands	Maintenance of Public Open Space and Tree Planting	£71,889	Regular routine grounds maintenance with replacements as necessary	£14,378	£14,377	Jul 2015	Dalston/Harraby	11022
Levens Drive/ Newlathes Ave	Provision of Public Open Space, Formal Sports and Children's Play Facilities	£57,805	Agreement that works will be undertaken at Isobel's Green next year by Riverside utilising these funds	None	£57,805	Mar 2013 Extended by negotiation	Morton	11023
	Maintenance of the above	£31,345	None	None	£ 31,345	Mar 2020		
Gelt Rise, Brampton	Provision of additional Play Area	£12,800	None	None	£12,800	Feb 2021	Brampton	11026

Planning Application Location	Commitment	Original Sum	Summary of Works Undertaken 13/14	Amount Spent 13/14	Balance Outstanding	Expiry date of funds	Parish/Ward	Finance Ref
	Maintenance of Play Area	£ 3,551	Weekly checks of play area and maintenance of existing equipment	£ 355	£ 2,841	Feb 2021	Brampton	
Carleton Grange, Garlands	Maintenance of Play Area	£10,000	Weekly checks of play area and maintenance.	£1,000	£ 7,000	Mar 2021	Harraby/Dalston	11029
	Maintenance of Public Open Space	£102,837	Regular routine grounds maintenance.	£ 10,958	£ 71,306	Mar 2021		
Seatoller Close	Enhancement of off-site provision in the Morton Ward	£14,481.56	Regular routine grounds maintenance.	£ 3,620.39	£ 7,240.78	June 2016	Morton	11030
Stainton Road, Etterby	Provision and enhancement of public open space in the District	£43,790	Improvement of public open space inc sports pitches in Belah	£ 8,758	£ 26,274	Jun 2016	Belah	11032
Watts Yard, London Road	For play equipment at Melbourne Park	£27,160	None	None	£27,160	Jan 2022	St Aidans	11033
	10 year maintenance	£ 5,731.59	Weekly checks of play area and maintenance of existing equipment.	£ 573	£4,585.59	Jan 2022		
St Elisabeths, Harraby	Maintenance of Public Open space	£ 8,979.25	None	None	£ 8,979.25	May 2017	Harraby	11034
Site F, Brookside, Raffles, Carlisle*	Maintenance @ Heysham Park	£12,823	None	None	£12,823		Belle Vue	11037
Norfolk Street, Denton Holme,	Provision & enhancement of	£50,000	None	None	£50,000	Sep 2017	Denton Holme	11038

Planning Application Location	Commitment	Original Sum	Summary of Works Undertaken 13/14	Amount Spent 13/14	Balance Outstanding	Expiry date of funds	Parish/Ward	Finance Ref
Carlisle	public open space							
Pennine View*	Maintenance of 2 parcels of land Parkland Village/Carleton Grange	£ 3,570.75	None	None	£ 3,570.75		Dalston/Harraby	11042
Briar Bank	Maintenance and enhancement of offsite open space provision	£9,973.71	None Proposed works to mini football pitches next year.	None	£ 9,973.71		Belah	11039
Alexandra Drive	Open Space Contribution	£93,440.08	None	None	£93,440.08	Dec 2023	Wetheral	11043
	Maintenance of the above	£50,669.37	None	None	£50,669.37	Dec 2023		
		<b>£874,376.61</b>		<b>£64,011.39</b>	<b>£648,802.83</b>			

### Infrastructure

Location	Commitment	Original Sum	Summary of Works Undertaken 13/14 or Comments	Amount Spent 13/14	Balance Outstanding	Expiry date of funds	Parish/Ward	Finance Ref
Immediate area around Carlisle College	Contribution towards Cycle Network and improvement of pedestrian facilities in the immediate vicinity	£ 29,750	Zero path works completed, other outstanding works on Newark Terrace once agreement has been reached with adjacent retail store.	None	£29,750		Castle	11024
Caldew Cycle Way/ Willowholme	"Castle Way Ramp" To implement a section of the cycleway as	£370,000	Discussions ongoing with Sainsbury's regarding options	none	£346,841	Feb 2016	Castle	11027



Location	Commitment	Original Sum	Summary of Works Undertaken 13/14 or Comments	Amount Spent 13/14	Balance Outstanding	Expiry date of funds	Parish/Ward	Finance Ref
	detailed in the agreement							
Public Realm, Caldewgate/ Shaddongate	Undertake works defined as a range of initiatives arising from the adopted Urban Design Ground and Public Framework comprising structural landscaping and associated to Church St, Bridge St & Shaddongate corridor.	£370,000	£20K committed to improve cycle access alongside a county council scheme. Scheme for 'Paddy's Market'	None	£370,000	Feb 2016	Castle	
Petteril Cycle Route (Watts Yard)	Towards the River Petteril Cycle Route Access Improvement Scheme	2 tranches of £39,790 2 <sup>nd</sup> rec'd 05/06/13	Scheme under review as developer has to construct link required under the PP approval. The scheme will then join that built by developer and the path along the River Petteril	None	£ 79,580	June 2023	St Aidans	11035
Caldew Cycleway (Norfolk Street Student development)	Improvements to the Caldew Cycleway	£16,000	None	None	£ 16,000	Sep 2017	Denton Holme	11038
Crindledyke	Highways Improvements 1 <sup>st</sup> contribution	£ 25,000	None	None	£ 25,000	July 2018	Stanwix Rural	11040
	Highways Improvements 2 <sup>nd</sup> Contribution	£ 10,000	None	None	£ 10,000	July 2018		
	Transport Improvements 2 <sup>nd</sup> Contribution	£281,000	None	None	£281,000	July 2018		
	Travel Plan Administration Fee	£ 11,125	None	none	£ 11,125			

Location	Commitment	Original Sum	Summary of Works Undertaken 13/14 or Comments	Amount Spent 13/14	Balance Outstanding	Expiry date of funds	Parish/Ward	Finance Ref
The Racecourse	Contribution towards Currock Link Instalments	£24,800 <sup>8</sup>	None	None	£24,800	5 yrs from payment	Dalston	11041
Alexandra Drive (Barley Edge)	Highways Contribution [Footpath]	£ 13,500	Developer commitment to be completed		£13,500		Wetheral	11043
		<b>£1,230,755</b>			<b>£1,207,596</b>			

## Parish Councils - Financial

### *Open Space/Play Areas*

Application/Location	Commitment	Original Sum	Summary of Works Undertaken 13/14	Amount Spent 13/14	Balance Outstanding	Expiry date	Parish/Ward
Former Depot/Dandy Croft Brampton	Maintenance of King George V Playing Fields	£4,230	None	None	£4,230	Nov 2021	Brampton
The Shieling, Cumwhinton	Provision of children's playing facilities within the village of Cumwhinton	£ 3,000	Planning Permission submitted for creation of a play area 14/0174 - undetermined	None	£ 3,000	Aug 2017	Wetheral

<sup>8</sup> Currently being made in instalments

# Outstanding Obligations to Carlisle City Council from previous years as at 31 March 2014 (in part or full)

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Outstanding	When Due/Comment
97/0604	20/01/99	Crowther Homes	Suttle House, Wigton Road, Carlisle. Now known as The Beeches. <b>Ward – Yewdale</b>	Housing Development	Drainage & Sport Pitch Contribution payable following the grant of permission of the adjoining development land (formula based)	<b>Being reviewed in light of the adjacent development (10/1026 – know known at Brackenleigh) expect to enter into a Deed of Variation.</b>
11/0713	10/08/01				Transfer of land to the Council for the consideration of £1 upon payment of £38,000 from the developer	
06/1265	14/03/06	Harrison Northern Ltd	Highgrove Dairy <b>Ward – Harraby</b>	Housing Development	Transfer of the land to the Council marked in the Deed to be used as Public Open Space and Children’s Play Area. £10,000 Commuted sum for maintenance of the above 4 Discounted Affordable Units @ 75% OMV	Upon completion of the development  Within 1 month of completion of the development. Throughout construction <b>(Under Construction)</b>
08/1059 12/0383	28/09/09 11/12/12	Citadel Estates Ltd	The George, Warwick Bridge <b>Parish - Wetheral</b>	Mixed Development Comprising Retail Development With 24	3 Affordable Units @ 70% OMV £5,000 provision &	Throughout construction. Prior to 1 <sup>st</sup>

				Apartments	maintenance of play area at Downgate,	occupation of 10 <sup>th</sup> unit <b>(Under Construction)</b>
09/0216	25/01/10	Northern Developments (Cumbria Ltd)	Land adj to Blackwell House, Durdar Road, Carlisle <b>Ward – St Cuthberts Without Parish - Dalston</b>	Residential Development	Commuted Sum for "Currock Link" of £24,800	<b>Instalments being made (Under Construction)</b>
09/1059 11/0369 11/0495 12/0103	04/10/10 08/12/11 20/02/13 16/09/13	Briery Homes Ltd Now Oakmere Homes	Former Sawmill, Netherby Road, Longtown <b>Parish - Arthuret</b>	Housing Development	£26,000 for the maintenance of the on-site play area	<b>Upon completion of the on-site play area. (Under Construction)</b>
06/0993	10/05/10	Bimson Homes	Greenholme Lodge, Corby Hill <b>Parish - Hayton</b>	Conversion of redundant courtyard steading to provide 6 No Live/Work units.	Occupancy Restriction: The occupant must run a business from the property	Throughout construction <b>(revised undetermined application 12/0202)</b>
09/0861	28/05/10	Personal Covenant	Barns at Lees Hill, Brampton <b>Parish - Askerton</b>	Change Of Use Of Stone Barn to Live/Work Unit	Occupancy Restriction: The occupant must run a business from the property	Throughout construction <b>(Under Construction)</b>
09/0245 12/0025	08/07/10 13/12/12	Lancaster Roman Catholic Diocesan Trustees and McCarthy & Stone Retirement Lifestyles Limited	Land at St Augustines Church, Waverley Gardens Carlisle <b>Ward – Stanwix Urban</b>	Housing for the elderly comprising of 42 apartments	Affordable Housing: £223,373 Index Linked payable in 3 equal tranches Public Open Space Contribution: £11,627	Prior to 1 <sup>st</sup> occupation of the 1 <sup>st</sup> , 12 <sup>th</sup> and 24 <sup>th</sup> dwelling  Payable prior to 1 <sup>st</sup> occupation of 1 <sup>st</sup> dwelling <b>(Permission unimplemented, work is currently taking place on replacement hall)</b>
07/1312 11/0120	18/08/10 13/06/12	Senator Homes (now known as	Former Penguin Factory, Westmorland	Proposed Residential Development	Affordable Housing: 4 – RP rented	Throughout construction

		Persimmon Homes)	St, Carlisle <b>Ward – Denton Holme</b>		2 - discounted (70% OMV) £84,520 In lieu of on site provision (inc Play area)	Prior to occupation of 35 <sup>th</sup> dwelling <b>(Commenced Feb 14) – Awaiting DOV</b>
10/0346	01/10/10	Story Homes	Former Depot Station Road, Dandycroft, Station Rd, Brampton <b>Parish - Brampton</b>	Residential Development	On site Open Space: To be laid out by the developer. Upon satisfactory completion transferred to the Council for the consideration of £1. Upon Transfer pay a Maintenance sum of £14,204 (10 yrs from receipt.)	At appropriate stage of development <b>(Site complete awaiting confirmation from developer regarding laying out of on-site Open Space)</b>
09/0413 13/0207	15/11/10 23/07/13	Church Commissioners for England	Morton Development, Carlisle <b>Parish – Cumberdale Ward - Various</b>	Development for Residential (Maximum 825 Dwellings), Employment (40,000m2 Floorspace), And Public Open Space	<b>See Appendix 1</b> Affordable Housing Open Space	Throughout Development <b>(Reserved Matters determined 23/07/13)</b>
10/0642 13/0798	16/12/10 10/04/14	Wellburn Care Homes and Cumbria Cerebral Palsy and Impact Housing Association	Scalesceugh Hall, Carleton, Carlisle <b>Parish – St Cuthbert's Without</b>	Proposed 47 Bed Residential Care Home With associated 6 Close Care Cottages to be constructed within the grounds.	Occupancy Restriction: Closed Care Housing (aged 55 or over falling between traditional sheltered housing and full residential care)	In perpetuity  <b>(Permission renewed with DOV)</b>
10/0265	03/04/11	Personal Covenant	Brampton Playhouse, Moatside, Brampton <b>Parish - Brampton</b>	Demolition of redundant Brampton Playhouse. Erection of 5 No. dwellings	Commuted sum in lieu of on-site provision (30% of the open market value of all 5 dwellings divided by 10	Payable on sale of 3 <sup>rd</sup> dwelling. <b>(Permission unimplemented – expires April 14)</b>

09/0815	07/04/11	Denton Business Park Ltd	Former storage & workshop buildings, Denton St, Carlisle  <b>Ward – Denton Holme</b>	Erection Of 40no. Craft/Art Workshop Units, Retail Facilities, Admin Support With Performance Areas, 196no. Student Bedrooms Creation Of 2no. Additional Flats; Alterations To 2no. Flats	<b>Cycle Network:</b> £46,000 <b>Sports Provision:</b> £48,584 <b>Other:</b> Gates to the development to be designed by qualifying Students by way of a design competition	Both within 14 days of commencement .  <b>(Permission unimplemented app 14/0068 to discharge conditions)</b>
10/0577	13/06/11	Dean Montgomery	Tarn end House, Talkin  <b>Parish - Brampton</b>	Removal Of The Effects Of Conditions 2, 3, 4, 5 And 6 Attached To The Grant Of Full Planning Permission Under Application 06/0693 (Conversion To 8no. Holiday Units) To Enable Unrestricted Residential Occupation	<b>Affordable Housing Financial Contribution:</b> Min £3,875 per dwelling linked to Nationwide House Price Index,	Payable on first occupation of each dwelling  <b>(Permission unimplemented)</b>
10/0965	13/06/11	Dean Montgomery and Dawn MacKenzie	Land SE of Town Foot Farm, Talkin  <b>Parish - Hayton</b>	Demolition Of Existing Laboratory Building; Erection Of Terrace Of 4No. Dwellings	<b>Affordable Housing:</b> 2 Discounted Rental Units @ 75% Market Rent subject to Lettings and Disposal Policy	<b>Development complete but in breach of S106 agreement – Negotiations in progress awaiting new S106 to be entered into</b>
09/1082	25/08/11	Tesco Stores Ltd and Cumbria County Council	Bowling Green Adj to Horse and Farrier Public House, Wigton Road, Carlisle  <b>Ward - Yewdale</b>	Erection Of A Convenience Foodstore	<b>Horse and Farrier Public House:</b> Undertake works as specified in agreement before occupation of the store and procure marketing of the public	<b>(Permission unimplemented)</b>



					house during the Marketing Period (6 months of occupation of the store)	
11/0181	05/10/11	Greensyke Property Ltd	Kingswood Educational Centre, Cumdivock <b>Parish - Dalston</b>	COU of existing educational buildings to 7 dwellings and erection of 1 dwelling	<b>Affordable Housing Financial Contribution:</b> Formula: (Market Value x 0.1) x 0.25	Payable 1 <sup>st</sup> occupation of relevant dwelling <b>(Under Construction)</b>
10/0164	19/10/11	Top Notch Contractors Ltd and Cumbria County Council	Former Prince of Wales Public House & Conversion of 102 Denton Street <b>Ward – Denton Holme</b>	Redevelopment to create 16 Apartments and 1 Commercial Unit	<b>Outdoor Sports Facilities:</b> £3,538 towards the improvement of outdoor sports facilities within the District.	14 days of commencement <b>(Permission unimplemented)</b>
11/0315 RM 12/0130	05/01/12 21/05/12	Personal Covenant	Land between Longlands and Stonelea, Greenwoodside, Smithfield <b>Parish – Kirklington Middle</b>	Live/Work Unit	<b>Live/Work Unit:</b>	<b>(Under Construction)</b>
11/0448	26/01/12	Personal Covenant	Former Highland Laddie, Todhills, Blackford <b>Parish – Rockcliffe</b>	Change of use to Live/Work Units	<b>Live/Work Unit:</b>	<b>(Permission unimplemented)</b>
09/0617	05/04/12	Story Homes Limited and 2 other 'Covenanting Parties' (conditionally indemnified)	Crindledyke, Carlisle <b>Ward – Stanwix Rural</b>	Residential Development	<b>Affordable Housing:</b> 81 – Social Rented 82 – Discounted (70% OMV)  <b>Open Space</b>  <b>Transport Improvements Contribution:</b>	Throughout Development  DOV now management scheme in lieu of payment

					<p>First contribution - £250,000</p> <p><b>Travel Plan:</b> Implement and comply with the Travel Plan for that Phase.</p> <p><b>New School</b> New School Bond of £3,500,000 together with notification regarding construction of the New School. New School to be completed and ready for occupation.</p> <p><b>Local Centre</b> To be constructed</p>	<p>Instalments</p> <p>Throughout development</p> <p>Notification prior to occupation of 60<sup>th</sup> dwelling</p> <p>Prior to occupation of the 199<sup>th</sup> dwelling</p> <p>Prior to the occupation of more than 649 dwellings. <b>(Commenced 31/08/12)</b></p>
10/1026	17/04/12	Persimmon Homes and Cumbria County Council	land to the Rear & West of Garden Village, Wigton Road, Carlisle, CA2 6QX <b>Parish - Cummersdale</b>	Residential Development Comprising The Erection Of 253No. Dwellings	<p><b>Affordable Housing:</b> 19 – Social Rented 37 – Discounted (70% OMV)</p> <p><b>Public Open Space:</b> to provide details of schemes prior to any phase and to have a Management Company in place prior to 1st occupation</p>	<p>Throughout Development</p> <p>Each Phase</p> <p><b>(Under Construction)</b></p>
11/0733	19/04/12	Personal Covenant	Iona, Gelt Road, Brampton, CA8 1QH <b>Parish - Brampton</b>	Demolition of existing workshop & stables; erection of 4 dwellings	<p><b>Affordable Housing</b></p> <p><b>Financial Contribution:</b> Formula: (Market Value x 0.1) x 0.3</p>	Upon 1st occupation of relevant unit. <b>(Permission unimplemented)</b>
10/1066	24/05/12	Citadel Estates	Skelton House,	Demolition of exiting	<b>Affordable Housing:</b>	Throughout

		Limited	Wetheral <b>Parish - Wetheral</b>	house, adjoining barn & outbuildings; erection of 15 2 bed apartments	3 – Discounted (70% OMV) – plots 14,15 & 17. <b>Property Management Policy</b> <b>Public Open space &amp; Relevant Works contribution</b> [£3,000]	development  To be in place prior to 1 <sup>st</sup> occupation  Payable within 28 days of 1 <sup>st</sup> occupation <b>(Commenced 18 Nov 13)</b>
11/0730	20/09/12	AP & J Brown and Cumbria County Council	Land adjacent Beech Cottage, Cumwhinton <b>Parish - Wetheral</b>	Erection Of 14 Dwellings, comprising of affordable and housing for the elderly	<b>Affordable Housing &amp; Housing for the Elderly:</b> 10- Discounted (70% OMV) <b>Play Equipment Contribution:</b> £5,000 To be used by Wetheral Parish Council for the provision of children’s play facilities within Cumwhinton.	Throughout Development  Payable within 28 days of commencement. <b>New Agreement being negotiated as a result of revised planning application 12/0856</b>
00/0439	09/10/12	Persimmon Homes Limited and Cumbria County Council	Land at Peter Lane, Morton, Carlisle <b>Ward – Dalston</b>	Residential Development	<b>Affordable Housing:</b> 30% affordable; 50:50 split Social Rented and Discounted (70% OMV). <b>Open Space Management Scheme: Public Open Space Contribution:</b> Sum to be agreed subject to terms within agreement on adjacent site (09/0413).	Throughout development  To be approved prior to commencement of development. Payable within 28 days of agreement. <b>(Reserved Matters 12/0855 awaiting DOV)</b>
12/0847	27/02/13	Personal	Rear 1 & 2	Residential	<b>Affordable Housing</b>	Contribution payable

		Covenant	Whitehouse, Walton, Brampton <b>Parish - Dalston</b>	Development	<b>Financial Contribution:</b> Formula: (Market Value x 0.1) x 0.3	upon first occupation of relevant unit. <b>(Permission unimplemented)</b>
11/0279	11/04/13	Diocesan Trustees	former Catholic Church of our Lady of Good Council, Burn Street, Longtown <b>Parish - Arthuret</b>	Residential Development (9 Dwellings)	<b>Affordable Housing Financial Contribution:</b> Formula: (Market Value x 0.1) x 0.3	Contribution payable upon first occupation of relevant unit. <b>(Permission unimplemented)</b>
12/0678	16/04/13	Personal Covenant	Land between Lomand & Gladsmuir, Broomfallen Road, Scotby <b>Parish- Wetheral</b>	Erection of 3 dwellings	<b>Affordable Housing Financial Contribution:</b> Formula: (Market Value x 0.1) x 0.3	Contribution payable upon first occupation of relevant unit. <b>(Under Construction)</b>
12/0811	26/04/13	Personal Covenant	Land adj Garth House, Greenfield Lane, Brampton <b>Parish - Brampton</b>	Erection of 5 dwellings	<b>Affordable Housing Financial Contribution:</b> Formula: (Market Value x 0.1) x 0.30	Payable upon practical completion of the 3rd relevant unit (for 3 units) and upon the 5th relevant unit (last 2 relevant units). <b>(Permission unimplemented)</b>
12/0854	06/06/13	Personal Covenant	Adj Scaurbank, Netherby Rd, Longtown <b>Parish - Brampton</b>	Erection Of 14no. Dwellings (Including 3no. Affordable Dwellings)	<b>Affordable Housing:</b> Plots 1,2,10 @ 70% OMV. <b>Open Space:</b> £23,954	Throughout Development  completion of the 8th Unit <b>(Permission unimplemented)</b>
10/0760	25/06/13	Personal Covenant	Helme Farm, Cumrew, Brampton, CA8 9DD <b>Parish - Cumrew</b>	Conversion Of Barns To Form 5no. Dwellings	<b>Affordable Housing Financial Contribution:</b> £34,000	Pay £6,800 within 4 months of completion of each dwelling (£34,000 in total) <b>(Permission unimplemented)</b>

12/0710	06/08/13	Cumbria County Council, Personal Covenanted Parties [indemnified by developer] and Story Home Limited	Rear of Scotby Green Steading <b>Parish – Wetheral</b>	Erection Of 45no. Dwellings, Associated Open Space And Infrastructure	<p><b>Affordable Housing:</b> 4 @ 70% OMV (1 x 2 bed; 3 x 3 bed) 3 for Affordable Rent (3 x 2 bed)</p> <p><b>Open Space:</b> Open Space Management Scheme</p> <p><b>Refuse Bin Contribution</b> Pay £1,500</p> <p><b>LEAP</b> Pay £50K.</p>	<p>Throughout Development</p> <p>Approved prior to occupation of any units abutting an area of open space</p> <p>prior to occupation of any residential unit.</p> <p>prior occupation of 20 units <b>(Under Construction)</b></p>
13/0562	04/11/13	Magnus Homes Limited & Cumberland Building Society	Rear of Lime House, Wetheral <b>Parish – Wetheral</b>	Erection Of 6no. Dwellings	<p><b>Affordable Housing Financial Contribution:</b> Formula: (Market Value x 0.1) x0.30</p> <p><b>Waste Management Scheme</b></p>	<p>Payable upon practical completion of the 4th relevant unit for all 6 units Prior to 1<sup>st</sup> occupation <b>(Under Construction)</b></p>
13/0450	28/11/13	Personal Covenant	West of Quarry House, Wetheral Pastures, Carlisle, CA4 8LE <b>Parish – Wetheral</b>	Erection of 3 dwellings	<p><b>Affordable Housing Financial Contribution:</b> Formula: (Market Value x 0.1) x0.30</p>	<p>Payable within 10 days of the 1st occupation of the second relevant unit <b>(Commenced 2/01/14)</b></p>
13/0224	19/02/13	Personal Covenant	Adj Gran View, Cargo, CA6 4AW <b>Parish – Kingmoor</b>	Erection of 2 dwellings OUT	<p><b>Affordable Housing Financial Contribution:</b> Formula: (Market Value x 0.1) x0.30</p>	<p>Contribution payable upon first occupation of each unit. <b>(Await RM)</b></p>
12/0610	19/12/13	Personal	Hadrian's Camp,	Residential	<b>Affordable Housing:</b>	All Prior to

		Covenant and Cumbria County Council	Houghton Road, CA3 0LG <b>Parish – Stanwix Rural</b>	Development (Outline)	<b>Open Space: Wildlife Mitigation/Contribution</b> £65K	commencement <b>(Permission unimplemented)</b>
13/0047	15/01/14	Story Homes Ltd	Buck Bottom Farm Burgh by Sands <b>Parish – Burgh by Sands</b>	Erection Of 3No. Dwellings, Conversion Of Barn To 1No. Dwelling	<b>Affordable Housing Financial Contribution:</b> Formula: (Market Value x 0.1) x0.30	Pay Contribution for the 4 relevant units upon 1st occupation of the 3rd relevant unit <b>(Permission unimplemented)</b>
12/0878	31/01/14	Story Homes Ltd and Personal Covenants and County Council	Land between Townhead Road and Station Road, Dalston <b>Parish – Dalston</b>	Erection Of 121no. Dwellings, Associated Open Space And Infrastructure	<b>Affordable Housing:</b> 8 Low cost 12 Rented <b>Recreation Contribution</b> £115,586 <b>Open Space:</b> Open Space Management scheme Transfer the relevant open space to a Management Company <b>Refuse Bin Contribution</b> £3,780	Throughout Development  payable prior to occupation of 10 units  payable prior to occupation of 10 units  payable prior to 1 <sup>st</sup> occupation. <b>(Permission unimplemented)</b>
12/0793	12/03/14	Cumbria County Council and Personal Covenants and Story Homes	Hammonds Pond, Oaklands Drive, Durdar Road, Carlisle <b>Parish – St Cuthberts Without</b>	Erection Of 318no. Dwellings	<b>Affordable Housing:</b> 35 Low cost [6 x 2 bed apts; 4 x 2 bed house; 23 x 3 bed; 2 x 4 bed] 31 Rented [6 x 2 bed apts; 8 x 2 bed house; 15 x 3 bed; 2 x bed] <b>Open Space &amp; The Upperby Park</b>	Throughout Development          Scheme prior to

					<p><b>Extension</b> Open Space Management Scheme Transfer the land to a Management Company.</p> <p><b>Upperby Improvements/ Contribution: INCLUDE:</b> Upperby Footpath Contribution: £185K Upperby Football Pitch Contribution £40K Park and Play Facilities Contribution £133K Upperby CCTV Contribution £10K</p>	<p>occupation of 1st unit of each phase.</p> <p>Following the issue of the Open Space Final Certificate by the council</p> <p>Prior to 1st occupation to have submitted Upperby Notice setting out which contributions will be paid and which works will be undertaken by covenanting parties. Triggers: prior to occupation of 30% of dwellings [95] and prior to occupation of 50% of dwelling [159] <b>(Permission unimplemented)</b></p>
13/0496	06/03/14	Personal Covenant  Advised of change of ownership	Land to the east of Village Green Brunstock <b>Parish – Stanwix Rural</b>	Erection Of 3no. Dwellings	<p><b>Affordable Housing Financial Contribution:</b> Formula: (Market Value x 0.1) x0.30</p>	Pay of all 3 units upon 1st occupation of the 2nd relevant unit <b>(Permission unimplemented)</b>
13/0787	24/03/14	Personal Covenant	Land at Orchard Gardens, Houghton, CA3 0LH <b>Parish – Stanwix Rural</b>	Development of approx 6 bungalows OUT	<p><b>Affordable Housing Financial Contribution:</b> Formula: (Market Value x 0.1) x0.30</p>	Pay Contribution upon 1st occupation of the relevant unit <b>(Await RM)</b>
13/0655	24/03/14	Top Notch	Former Dairy Site,	Residential	<b>Wheeled Refuse Bins:</b>	Prior to 1st

		contactors Ltd and Svenska Handlebanken AB (Publ)	Holywell Crescent, Botcherby, Carlisle, CA1 2TD <b>Ward – Botcherby</b>	Development (Outline Application)	secured the purchase and delivery of wheeled refuse bin for each unit <b>Sports &amp; Play Provision Contribution Capital Element:</b> £71,892 (index linked) <b>Sports &amp; Play Provision Contribution Maintenance Element:</b> £35,946 (index linked)	occupation of any unit  Prior to 1st occupation of any unit  Pay 50% prior to 1st occupation of any unit Pay 50% prior to 1st occupation of 30th unit <b>(Permission unimplemented)</b>
13/0792	26/03/14	Personal Covenant	land to rear of The Whins & adj to Sewage works, Allenwood, Heads Nook [part field 1717] <b>Parish – Wetheral</b>	OUT – indicative 5 dwellings	<b>Affordable Housing Financial Contribution:</b> Formula: (Market Value x 0.1) x0.30	Pay Contribution upon 1st occupation of the relevant unit <b>(Await RM)</b>
13/0762	27/03/14 Planning Permission 02/04/14	Personal Covenant	land to the east of Croftlands, Allenwood, Heads Nook <b>Parish – Hayton</b>	OUT – indicative 3 dwellings	<b>Affordable Housing:</b> 1 Low Cost @ 70% OMV	During development <b>(Await RM)</b>



## APPENDIX 1

<b>TRIGGER</b>	<b>COVENANT</b>	<b>PARA</b>
<b>Pre- Commencement</b>		
4 Months prior commencement 1 <sup>st</sup> Phase (and subsequent phases)	Owner serve notice on the Council detailing its election under para 3.2 (affordable housing provider)	3.2
<b>Phases</b>		
4 months prior to every phase	Owner serve notice on the Council detailing its election under para 3.2 (affordable housing provider)	3.2
90% Market Housing of each phase	Not to be occupied until all of the Affordable Housing Units allocated to that phase (if any) have been delivered	3.10
6 months after commencement of each phase	If the owner has not entered into a Contract with an Affordable Housing Provider under para 3.4 they may serve notice to the Council for its approval of Revised Affordable Housing Details (Revised Affordable Housing Provision Notice)	3.5
<b>Housing Development/Occupation</b>		
Not to Occupy Any Dwelling	£5k <b>Newlathes Avenue Bus Stop Contribution</b> has been paid.	County 10.1
Occupation of 50 <sup>th</sup> Dwelling and every 50 <sup>th</sup> Dwelling thereafter	Owner notify the County Council	County 12.10
Occupation of 101 Dwellings	£120k <b>Bus Service Capital Contribution</b>	County 6.1
Occupation of 185 Dwellings	Bus Service Not to be operated prior to occupation of 185 dwellings	County 5.1
	£100k <b>Pedestrian Connectivity Contribution</b>	County 10.1
After 185 Dwellings Occupied	County to serve written notice to owner confirming the date on which the bus service has come into operation and such notice shall be served within 28 days of the first operation of the bus service	County 8.3
	Upon receipt of the notice the owner shall pay £110k being the 1 <sup>st</sup> instalment of the <b>Bus Revenue Contribution</b>	8.1
	£110K on 1 <sup>st</sup> anniversary of 1 <sup>st</sup> instalment	8.1
	£110K on 2 <sup>nd</sup> anniversary of 1 <sup>st</sup> instalment	8.1
Occupation of 200 Dwellings	Owner shall carry out the Primary Leisure Area Works on Primary Leisure Land shown shaded dark green on plan 4 prior to 200 Occupation	1.2
After Occupation of 250 <sup>th</sup> Dwelling	County can serve written notice that it	County

but prior to Occupation of the 400 <sup>th</sup> Dwelling or 10 yrs from commencement (whichever the earliest)	requires the School Site. If served prior to 28 <sup>th</sup> dwelling then the owner shall not occupy more than 360 Dwellings until obligations 12 para 12.3 have been complied with. If served after occupation of 280 <sup>th</sup> dwelling then owner shall not occupy more than an additional 80 dwellings until obligations under para 12.3 have been complied with.	12
Occupation of 256 Dwellings	£30k <b>Bridging Payment</b> if CNDR Roundabout is not in operation	County 4.2
	£50K 1 <sup>st</sup> Instalment of <b>Modal Shift Contribution</b> (reduce by Bridging Payment if paid)	County 10.2
	£20k <b>McVities Roundabout Contribution</b>	County 10.1
	£25k <b>Traffic Signals Contribution</b>	County 10.1
	£30k 1 <sup>st</sup> Instalment <b>Cross City Bus Route Improvement Contribution</b> £35k 2 <sup>nd</sup> instalment on 1 <sup>st</sup> Anniversary of occupation of 256 <sup>th</sup> dwelling  £35k 3 <sup>rd</sup> instalment on 2 <sup>nd</sup> Anniversary of occupation of 256 <sup>th</sup> dwelling  Any Unexpended sum on 3 <sup>rd</sup> anniversary to be returned to the payer.	County 9.1     5 <sup>th</sup> Schedule 2.2
	If the Bus Service is NOT operational any unexpended sum of the <b>Bus Service Capital Contribution</b> (£120k paid on occupation of 101 <sup>st</sup> dwelling) shall be <b>returned</b> to the payer within 1 month of such occupation.	County 2.2
Occupation of 300 Dwellings	£50K 2 <sup>nd</sup> Instalment of <b>Modal Shift Contribution</b>	County 10.2
After the Occupation of the 360 <sup>th</sup> Dwelling and before Occupation of the 400 <sup>th</sup> Dwelling.	Owner pay the <b>Education Contribution</b> (Department for Children Schools and Families Cost Multiplier – [or equivalent]) by 159	County 12.7
Occupation 450 Dwellings	£62,813 3 <sup>rd</sup> Instalment of <b>Modal Shift Contribution</b>	County 10.2
Occupation 742 Dwellings	Not to occupy until owner has paid £4,928 per HA ( <b>Primary Leisure Area Maintenance Contribution</b> ). Adjusted by the Landscape Institute's index of inflation. To be used towards the maintenance of Primary Leisure Area	City 2
Occupation of 95% (784) Dwellings	Owner shall carry out the Primary Leisure Area Works on Primary Leisure Land shown shaded light green on plan 4 prior to 95% Occupation	City 1.2

<b>Other</b>		
Employment Units	Not to be occupied until: £5k <b>Wigton Road Bus Stop Contribution</b> has been paid	County 10.1
Megarider Scheme	Owner covenants to make available and provide on request one bus season ticket for the Megarider Scheme per dwelling until the operation of the Bus Service comes into effect up to a maximum cost of £20k in total for all tickets.	7.1
School Reserve Site	County shall use reasonable endeavours to ensure that a school is constructed on the School Reserve Site within 3 yrs from the date of transfer or 3yrs from the date of payment of the Education Contribution whichever is the later. In the event that material works of construction of the school have not commenced or a building contract has not been let for completion by the above, then the County shall offer back the School Reserve Site for £1 consideration.	
Affordable Housing	30% of dwellings 2 bed 30% = 74 3 bed 50% = 124 4 bed 20% = 49 NO MORE THAN 30% of TOTAL FLOORSPACE 50/50 split between discounted and Social Rented	