



PLANNING OBLIGATIONS

2014 to 2015



CARLISLE
CITY COUNCIL



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Introduction

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 Variation¹).

This annual report gives an overview of S106 agreements (and Unilateral Agreements²) 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.

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

² 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 2014 to 2015

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

Housing

40 Affordable Dwellings and **38** Extra Care

Commuted sums in lieu of on-site Affordable Housing Provision

Seven agreements have been entered into which are formula based to reflect market value of the properties built.

Financial

A total of £360,935 has been negotiated (excluding formula based calculations for affordable housing and education which will be determined at time of payment).

Of the sum quoted £247,135 is payable to the County Council for Transport, Education and Travel Plans. The balance is due to the City of Carlisle of which includes £11,000 is for the provision/enhancement and maintenance of Public Open Space and Children's Play Areas, £2,500 for alley gate provision and £100,300 for wildlife mitigation initiatives.

* * * * *

During the year delivery via S106 obligations has achieved:

Housing

57 Affordable Dwellings have been delivered (23 to a Registered Provider and 34 Discounted Sale including **3** in the rural area).

Financial

£177,416 has been **received** for a variety of dedicated projects for the provision and maintenance of Public Open Space/Children's Play Areas plus provision of refuse bins, habitat mitigation and to facilitate delivery of affordable housing.

* * * * *

Balances of monies [rounded] held by Carlisle city Council to complete undertakings as detailed within S106 agreements and unilateral agreements as at 31 March 2015:

In Lieu of on-site Affordable Housing	£ 21,250
Open Space and Children's Play Areas	£ 622,710
Infrastructure	£1,172,604
Refuse	£ 5,280
Habitat Mitigation	£ 300
Total	£1,822,144

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 2014 - 2015

Planning Permissions granted subject to a S106 Agreement:

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Overview
13/0728	24/04/14	Personal Covenant	Land rear of Hallcroft, Monkhill Parish - Beaumont	Erection of 7 no Dwellings	Affordable Housing 2 @ 70% OMV
12/0928	28/05/14	Personal Covenant	Land at How End Farm, Longtown Parish - Arthuret	Conversion of Agricultural Buildings to provide 3 no residential units	Affordable Housing Financial Contribution: Contribution payable upon first occupation of 3 rd relevant unit. Formula: (Market Value x 0.1) x 0.3
13/0534	06/06/14	Personal Covenant	Land adj The Oaks, Plains Road, Wetheral Parish – Wetheral	Erection Of 3no. Dwellings	Affordable Housing Financial Contribution: Contribution payable upon first occupation of any relevant unit Formula: (Market Value x 0.1) x 0.3
13/0841	11/06/14	Personal Covenant	Land behind Townfoot Farm, Castle Carrock Parish – Castle Carrock	Erection Of 4no. Dwellings	Affordable Housing Financial Contribution: Contribution payable upon first occupation of any relevant unit Formula: (Market Value x 0.1) x 0.3
13/0546 14/0490	19/06/14 16/09/14	Esh Developments Ltd	Land adj to Fallowfield, Plains Road, Wetheral Parish - Wetheral	Erection Of 3no. Dwellings	Affordable Housing Financial Contribution: Contribution payable upon first occupation of any relevant unit Formula: (Market Value x 0.1) x 0.3
13/0905	02/07/14	Personal Covenant	Rear 55-56 Scotby Road, Scotby Parish– Wetheral	Erection Of 45no. Dwellings, Associated Open Space And Infrastructure	Affordable Housing Financial Contribution: Contribution payable upon first occupation of 2 nd relevant unit. Formula: (Market Value x 0.1) x 0.3
13/0559	04/07/14	Personal Covenant	Field East of the strand, Aglionby Parish– Wetheral	Erection of Dwellings [outline]	Affordable Housing: 1 @ 70% OMV
12/0832	06/03/14 and DOV	Personal Covenant	Adj 445 Durdar Road, Carlisle	Erection Of 5no. Dwellings	Affordable Housing: 1 @ 70% OMV

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Overview
	25/07/14		Parish– St Cuthberts Without		Maintenance Contribution £1,000 maintenance of green and swings at Blackwell Common.
10/1116	18/08/14	Stobart Air Limited and Cumbria County Council	Carlisle Lake District Airport Parish– Irthington	Erection of Distribution Centre and raised and re-profiled runway	Habitats Contribution £100K payable upon occupation OR within 14 days or written request from /council Travel Plan - COUNTY £2,725 x 5 Monitoring fee [£13,625] £189,393.75 Travel Plan Fund Amount Travel Plan Bond
13/0778	02/10/14	Cumbria County Council and Cumberland Property Services Ltd and Aldi Stores Ltd	Land at Dalston Road, Carlisle Ward – Denton Holme	Erection of a Foodstore	Alley Gate Contribution £2,500 [indexed] payable prior to commencement of the resident's parking area Travel Plan - COUNTY Prior to Occupation pay Travel Plan Monitoring Fee Within 6 months of occupation, appoint Travel Plan Co-ordinator and submit final travel plan 1st anniversary of occupation - submit an Annual Performance Report.
13/0865	23/10/15	Personal Covenant & REG Windpower Ltd	Land at Hallburn Farm, Longtown Parish – Arthuret	Six Wind Turbines With A Tip Height Not Exceeding 126.5m,	Habitat Outline Management Plan: maintain the Habitat Site throughout 25 years of operation.
12/0856	12/11/14	AP & J Brown	L/A Beech Cottage, Cumwhinton Parish – Wetheral	Erection Of 15no. Dwellings Including 3no.Affordable Bungalows And 1no. Dwelling For The Elderly	Affordable Housing: 3 @ 70% OMV Provision of Play Equipment Contribution £5K payable within 28 days of commencement Education Infrastructure Contribution - COUNTY £39,117 payable prior to 1st occupation
13/0950	12/11/14	North Homes and Personal Covenants	Rear 46 Broomfallen Road, Scotby Parish – Wetheral	Erection Of 3no. Dwellings (Outline)	Affordable Housing Financial Contribution: Contribution payable upon first occupation of 2 nd relevant unit. Formula: (Market Value x 0.1) x 0.3

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Overview
14/0699	14/11/14	Personal Covenant	L/A Gran View, Cargo Parish – St Cuthberts Without	Erection of 2 no Dwellings	Affordable Housing Financial Contribution: Contribution payable upon 1 st disposal of the relevant unit. Formula: (Market Value x 0.1) x 0.3
14/0316	02/12/14	Personal Covenant	Land between Wetheral Methodist Church & Redcroft, Wetheral Parish – Wetheral	Erection Of 3no. Dwellings	Affordable Housing Financial Contribution: Contribution payable upon 1 st occupation of the relevant unit. Formula: (Market Value x 0.1) x 0.3
14/0329	17/12/14	Impact Housing Association	Irthing Centre, Union Lane, Brampton Parish – Brampton	Demolition Of Former Two Storey Business Centre; Construction Of 38No. Extra Care Residential Units	Extra Care UNITS for rent [age restriction 55 unless exceptional circumstance] Lettings and Disposal Policy to be submitted prior to occupation
14/0062	26/02/15	Personal Covenant	West of M6, Todhills, Blackford Parish – Rockcliffe	Erection Of 1no. Wind Turbine 45m Hub Height, 67.5m To Tip Height And Associated Infrastructure	Owl Box Contribution pay £300 upon practical completion
14/0105	12/03/15	Amber Real Investments Ltd and Cumbria County Council	North of Petteril Terrace, Durranhill, Carlisle Ward – Harraby	Residential Development (Outline)	Traffic Signal Contribution - COUNTY Pay £5,000 on commencement Travel Plan
14/0816	17/03/15	Magnus Homes & Cumberland Building Society	Rear of Thornedge, Station Road, Cumwhinton Parish – Wetheral	Demolition Of Existing House And Stables; Erection Of 22no. Dwellings	Affordable Housing Plots 15,16,19. Low Cost Housing Scheme to be submitted prior to commencement Provision of Play Equipment Contribution Pay £5k prior to the completion of 14 residential units

Deed of Variation with Material Change

12/0855	01/07/14	Persimmon Homes Ltd	Land at Peter Lane, Carlisle Parish – Cummersdale	Erection of 103 Dwellings	Affordable Housing: 30% provision deleted as will be provided on development at former Penguin Factory, Westmorland Street, Carlisle
Linked to above	01/07/14	Persimmon Homes Ltd	Former Penguin Factory, Westmorland Street, Carlisle Ward – Denton Holme	Erection of 37 Dwellings	Affordable Housing: All dwellings are affordable [Increase of 31]: Plots 1-4; 10-13; 24-29 & 31 = Affordable Rent [15] - was 4 Plots 5-9; 14-23; 30; 32-37 = Discounted [22] - was 2
14/1078	12/02/15	Personal Covenants	L/A Gran View, Cargo Parish – Kingmoor	Erection of 2 Dwellings	Affordable Housing Financial Contribution: Deleted
14/0460	18/02/15	Persimmon Homes and Cumbria County Council	Garden Village [known as Brackenleigh] Parish – Cummersdale	Residential Development	Affordable Housing Reduction from 19 to 2 Affordable Rented Dwellings (Plots 147/8) Increase from 37 to 58 Discounted Sale (70% OMV)

Summary of Obligations Entered into:

Financial – Commuted Sums - 2014 to 2015

Open Space/Play Areas	Habitats	Affordable Housing Contribution	Alley Gate	Transport (County)	Travel Plan (County)	Education (County)	Parish/Ward
		Formula					Arthuret
		Formula					Wetheral
		Formula					Castle Carrock
£1,000							St Cuthberts Without
	£100,000				£189,393 & £13,625 -		Irthington

Open Space/Play Areas	Habitats	Affordable Housing Contribution	Alley Gate	Transport (County)	Travel Plan (County)	Education (County)	Parish/Ward
					Monitoring		
			£2,500		Unspecified		Denton Holme
£5,000						£39,117	Wetheral
		Formula					St Cuthberts Without
	£300 [owl boxes]						Rockcliffe
				£5,000 [traffic signals]			Harraby
£5,000							Wetheral
		Formula [DOV-since deleted]					Parish – Kingmoor
£6,000	£100,300		£2,500	£5,000	£203,018	£39,117	

Non financial 2014 to 2015

Affordable Housing

	Social Rented	Discounted	Parish/Ward
Rear Hallcroft		2	Beaumont
East of the Strand, Aglionby		1	Wetheral
Rear of Thornedge, Cumwhinton		3	Wetheral
444 Durdar Road		1	St Cuthberts Without
Beech Cottage, Cumwhinton		3	Wetheral
Peter Lane [DOV]	-15 [original was indicative]	-15 [original was indicative]	Cummersdale
Former Penguin Factory, Carlisle [DOV]	11	20	Denton Holme
Garden Village [DOV]	-17	21	Cummersdale

	Social Rented	Discounted	Parish/Ward
Hadrians Camp, Houghton ³	12	13	Stanwix Rural
	-9	49	40

Note: A further 18 dwellings have been granted permission at Ashness Drive and 13 at Lochinvar Close Longtown for a Registered Provider, but are not subject to a S106 agreement.

Also the 38 rented Extra Care Units at the Irthing Centre, Brampton are expected to be affordable.

Occupancy Clauses

Affordable Housing has Qualifying Persons restrictions within the agreements

Extra Care

Irthing Centre, Brampton: 38 units for rent [age restricted] - Lettings and Disposal Policy to be submitted

Land Transfer

May occur as part of Open Space Management Plans

Other

Land at Hallburn Farm, Longtown: Habitat Management Plan to maintain habitat site throughout 25 years of operation.

³ Agreement 13/14 - Scheme now submitted

Delivery of Obligations 2014 to 2015

BY DEVELOPERS TO CARLISLE CITY COUNCIL

Non-Financial

Affordable Housing

	Social Rented	Discounted	Parish/Ward
Harraby Green		1	Harraby
Former Penguin Factory	8	8	Denton Holme
Crindledyke	15	8	Kingmoor
Garden Village [Brackenleigh]		10	Cummersdale
Hammonds Pond		4	St Cuthberts Without
Scotby Green Steading		3	Wetheral
	23	34	57

*It should be noted these figures are for the delivery of affordable housing through S106 agreements. A **further 76 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

S106 Agreement	Amount	Purpose	Parish/Ward	Finance Ref
11/0181 Kingswood Educational Centre, Cumdivock	£ 6,250	Affordable Housing Contribution [Rural West]	Dalston	11045
12/0710 Rear Scotby Green Steading	£ 1,500	Refuse Bin Contribution [on-site refuse bins]	Wetheral	11046
	£ 50,000	Locally Equipped Area of Play [LEAP] works to be commissioned by Wetheral Parish Council		11048
12/0878 Townhead Road/ Station Road Dalston	£ 3,780	Refuse Bin Contribution [on-site refuse bins]	Dalston	11047
	£115,586	Recreational Contribution – childrens play areas and sports facilities.		11049
14/0816 Todhills, Blackford	£ 300	Provision of Owl Boxes	Rockcliffe	11050
	£177,416			

Carlisle City Council - Financial

Affordable Housing

Planning Application Location	Commitment	Original Sum	Summary of Works Undertaken 14/15	Spent 14/15	Balance Outstanding	Expiry date	Parish/Ward	Finance Ref
10/0970 WI Hall, Brier Lonning, Hayton	To support delivery of affordable housing by Underwrite Education Contribution @ Cumwhinton	£15,000	None	nil	£ 980	April 2021	District	11028

Planning Application Location	Commitment	Original Sum	Summary of Works Undertaken 14/15	Spent 14/15	Balance Outstanding	Expiry date	Parish/Ward	Finance Ref
11/0818 The Sheiling, Meadow View, Cumwhinton	Provide school transportation due to lack of capacity at Cumwhinton School	£14,082 ⁴	No confirmation of primary school aged children being transported	Nil	£14,082	Dec 2017	Wetheral	11045
11/0181 Kingswood Educational Centre, Cumdivock	Affordable Housing Contribution [Rural West]	£ 6,250	None	Nil	£6,250	2019	Dalston	11045
				Nil	£21,250			

Open Space/Play Areas

Planning Application Location	Commitment	Original Sum	Summary of Works Undertaken 14/15	Spent 14/15	Balance Outstanding	Expiry date	Parish/Ward	Finance Ref
00/0713 The Beeches, Wigton Road	Maintenance of Play Area	£10,000	Weekly checks of play area and maintenance	£ 2,000	nil	2016	Yewdale	11005
Holme Head Bay*	Maintenance of Public Open Space.		Regular routine grounds maintenance	£ 600	£ 3,000	N/A	Denton Holme	11006
Scotby Road, Scotby*	Maintenance of Public Open Space		Amenity grass land & play area maintenance	£ 1,630	£ 1,480		Wetheral	11007
Windsor Way*	Maintenance of Play Area		Weekly checks of play area and	£ 600	£ 3,000		Stanwix Rural	11008

⁴ Internal transfer of monies.

Planning Application Location	Commitment	Original Sum	Summary of Works Undertaken 14/15	Spent 14/15	Balance Outstanding	Expiry date	Parish/Ward	Finance Ref
			maintenance					
Walkmill, Warwick Road*	Maintenance of Play Area within vicinity of the site		Football pitch maintenance	£ 2,310	£11,550		Botcherby	11009
04/0902 Wakefield Road, Lowy Hill	Maintenance of Play Area - Moorville Drive	£10,000	Weekly checks of play area and maintenance	£ 1,000	£ 5,000	Dec 2019	Belah	11010
04/0275 Turnstone Park	Maintenance of Play Area	£10,000	Weekly checks of play area and maintenance	£ 1,000	£ 1,900	Sep 2020	Belle Vue	11011
Jocks Hill, Brampton*	Maintenance of Public Open Space		Weekly checks of play area and maintenance	£ 268	£ 802		Brampton	11012
Greenfield Lane, Brampton*	Maintenance of Public Open Space		Rope at Irthing Park	£ 530	£ 5,572		Brampton	11014
07/1241 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 maintenance	£ 4,535	£ 5,623.30	Sep 2019	Belle Vue	11016
06/0667 07/0304 Former Cavaghan & Gray, London Road	Recreational facilities associated with 3 Rivers Strategy or improvements at community centre	£137,500	Contribution to Dale End Play Area inc installation of new equipment, repairs & landfill	£59,120.22	£ 15,956.78	Sep 2020	Harraby	11017

Planning Application Location	Commitment	Original Sum	Summary of Works Undertaken 14/15	Spent 14/15	Balance Outstanding	Expiry date	Parish/Ward	Finance Ref
08/1182 Harraby Methodist Church, Cumwhinton Road	Maintenance of Play Area	£ 5,670	Weekly checks of play area and maintenance.	£ 3,335	Nil	May 2014	Harraby	11018
Tribune Drive *	Remedial work and 10 year maintenance of Public Open Space	£20,025	Regular routine grounds maintenance.	£ 1,800	£ 9,000	Jul 2019	Stanwix Rural	11019
09/0511 Heysham Park, Raffles	Maintenance of Public Open Space	£25,000	Weekly checks of play area and maintenance. Regular routine grounds maintenance.	£ 2,500	£12,500		Belle Vue	11021
00/0393 00/0693 00/0079 Parkland Village, Garlands	Maintenance of Public Open Space and Tree Planting	£71,889	Regular routine grounds maintenance with replacements as necessary	£14,377	Nil	Jul 2015	Dalston/Harraby	11022
09/0036 Levens Drive/ Newlathes Ave	Provision of Public Open Space, Formal Sports and Children's Play Facilities	£57,805	Riverside undertaking designated works @ Isobel's Green	£57,805	Nil		Morton	11023
	Maintenance	£31,345	None	None	£ 31,345	Mar 2020		
10/0425 Gelt Rise,	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 14/15	Spent 14/15	Balance Outstanding	Expiry date	Parish/Ward	Finance Ref
Brampton	Maintenance of Play Areas	£ 3,551	Weekly checks of play area and maintenance of existing equipment	£ 355	£ 2,486	Feb 2021	Brampton	
96/0830 Carleton Grange, Garlands	Maintenance of Play Area	£10,000	Weekly checks of play area and maintenance.	£1,000	£ 6,000	Mar 2021	Harraby/ Dalston	11029
	Maintenance of Public Open Space	£102,837	Regular routine grounds maintenance.	£ 10,283	£ 61,023	Mar 2021		
10/0818 Seatoller Close	Enhancement of off-site provision in the Morton Ward	£14,481.56	Regular routine grounds maintenance.	£ 1,810.20	£ 5,430.58	June 2016	Morton	11030
10/0508 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	£ 17,516	Jun 2016	Belah	11032
07/0845 Watts Yard, London Road	For play equipment at Melbourne Park	£27,160	None	None	£27,160	Jan 2022	St Aidans	11033
	Play equipment maintenance	£ 5,731.59	Weekly checks of play area and maintenance of existing equipment.	£ 573	£4,012.59	Jan 2022		
12/0108 St Elisabeths, Harraby	Maintenance of Public Open space	£ 8,979.25	Regular routine ground maintenance	£1,795.85	£ 7,183.40	May 2017	Harraby	11034
11/0135 Site F, Brookside, Raffles, Carlisle*	Maintenance @ Heysham Park	£12,823	Contacted work on Heysham Park	£4,850	££7,973		Belle Vue	11037

Planning Application Location	Commitment	Original Sum	Summary of Works Undertaken 14/15	Spent 14/15	Balance Outstanding	Expiry date	Parish/Ward	Finance Ref
10/0863 Norfolk Street, Denton Holme, Carlisle	Provision & enhancement of public open space	£50,000	None	None	£50,000	Sep 2017	Denton Holme	11038
Pennine View*	Maintenance of 2 parcels of land Parkland Village/Carleton Grange	£ 3,570.75	None	None	£ 3,570.75		Dalston/Harraby	11042
11/1060 Briar Bank	Maintenance and enhancement of offsite open space provision	£9,973.71	Works to Belah football pitches	£6,805	£ 1,767.51		Belah	11039
10/0792 Alexandra Drive	Open Space Contribution	£93,440.08	Pitch scanning commissioned	£637.50	£92,802.58	Dec 2023	Wetheral	11043
	Maintenance of the above	£50,669.37	None	None	£50,669.37	Dec 2023		
12/0710 Rear Scotby Green Steading	Locally Equipped Area of Play [LEAP] works to be commissioned by Parish Council	£50,000	None	None	£50,000	Dec 2019	Wetheral	11048
12/0878 Townhead Road/ Station Road Dalston	Recreational Contribution – childrens play areas and sports facilities.	£115,586	None	None	£115,586	Feb 2020	Dalston	11049
		£1,039,962.61		£190,277.77	£622,709.86			

Infrastructure

Location	Commitment	Original Sum	Summary of Works Undertaken 14/15 or Comments	Spent 14/15	Balance Outstanding	Expiry date	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	N/A	Castle	11024
Caldew Cycle Way/ Willowholme	"Castle Way Ramp" To implement a section of the cycleway as detailed in the agreement	£370,000	Commissioning of survey works	£6,934.93	£339,906.07	Feb 2016	Castle	
Public Realm, Caldewgate/ Shaddongate	Undertake works defined as a range of initiatives arising from the adopted Urban Design Guide and Public Framework	£370,000	Commissioning of survey works and improvements undertaken by County Council – referred to last year.	£28,057	£341,943	Feb 2016	Castle	11027
Petteril Cycle Route (Watts Yard)	Towards the River Petteril Cycle Route Access Improvement Scheme	£79,580	Developer to construct link required under the approval. A 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 st contribution	£ 25,000	None	None	£ 25,000	July 2018	Stanwix Rural	11040

Location	Commitment	Original Sum	Summary of Works Undertaken 14/15 or Comments	Spent 14/15	Balance Outstanding	Expiry date	Parish/Ward	Finance Ref
	Highways Improvements 2 nd Contribution	£ 10,000	None	None	£ 10,000	July 2018		
	Transport Improvements 2 nd Contribution	£281,000	None	None	£281,000	July 2018		
	Travel Plan Administration Fee	£ 11,125	None	none	£ 11,125	N/A		
The Racecourse	Contribution towards Currock Link	£24,800	None - Currock Link scheme finalised	None	£24,800	Oct 2019	Dalston	11041
Alexandra Drive (Barley Edge)	Highways Contribution [Footpath]	£ 13,500	None - Work conditioned within planning application to be completed	None	£13,500	Dec 2023	Wetheral	11043
		£1,230,755		£34,992	£1,172,604			

Refuse Contributions

Planning Application Location	Commitment	Original Sum	Summary of Works Undertaken 14/15	Spent 14/15	Balance Outstanding	Expiry date	Parish/Ward	Finance Ref
Townhead Road/ Station Road Dalston	Provision of on-site refuse bins	£3,780	None	Nil	£3,780		Dalston	11047
Rear Scotby Green Steading	Provision of on-site refuse bins	£1,500	None	Nil	£1,500		Wetheral	11049
		£5,280		Nil	£5,280			

Habitat Contributions

Application/ Location	Commitment	Original Sum	Summary of Works Undertaken 14/15	Spent 14/15	Balance Outstanding	Expiry date	Parish/ Ward	Finance Ref
Todhills, Blackford	Provision of 3 Owl Boxes	£300	None	Nil	£300	Feb 2020	Rockcliffe	11050
		£300			£300			

Parish Councils - Financial

Open Space/Play Areas

Application/ Location	Commitment	Original Sum	Summary of Works Undertaken 14/15	Spent 14/15	Balance Outstanding	Expiry date	Parish
Former Depot/Dandy Croft Brampton	Maintenance of King George V Playing Fields	£4,230	Contribution towards fencing around play equipment – total Cost £10,240	£2,246.27	£1,983.73	Nov 2021	Brampton
The Shieling, Cumwhinton	Provision of children's playing facilities within the village of Cumwhinton	£ 3,000	Planning Permission 14/0174 – WDN alternative site found await new application	None	£ 3,000	Aug 2017	Wetheral
		£7,230		£2,246.27	£4,983.73		

Outstanding Obligations to Carlisle City Council as at 31 March 2015 (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. Ward – Yewdale	Housing Development	Drainage & Sport Pitch Contribution payable following the grant of permission of the adjoining development land (formula based)	Being reviewed in light of the adjacent development (10/1026 – know known at Brackenleigh) expect to enter into a Deed of Variation.
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 Ward – Harraby	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	Upon completion of the development Within 1 month of completion of the development. (Under Construction)
08/1059 12/0383	28/09/09 11/12/12	Citadel Estates Ltd	The George, Warwick Bridge Parish - Wetheral	Mixed Development Comprising Retail Development With 24 Apartments	3 Affordable Units @ 70% OMV £5,000 provision & maintenance of play area at Downagate,	Throughout construction. Prior to 1 st occupation of 10 th unit (Complete with 2 units occupied)

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Outstanding	When Due/Comment
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 Parish - Arthuret	Housing Development	£26,000 for the maintenance of the on-site play area	Upon completion of the on-site play area. (Under Construction)
06/0993	10/05/10	Bimson Homes	Greenholme Lodge, Corby Hill Parish - Hayton	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 (Permission unimplemented)
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 Ward – Stanwix Urban	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 st occupation of the 1 st , 12 th and 24 th dwelling Payable prior to 1 st occupation of 1 st dwelling (Under Construction)
07/1312 11/0120	18/08/10 13/06/12	Senator Homes (now known as Persimmon Homes)	Former Penguin Factory, Westmorland St, Carlisle Ward – Denton Holme	Proposed Residential Development	Affordable Housing: 15 – RP rented 22 - discounted (70% OMV) £84,520 In lieu of on-site provision (inc Play area)	Throughout construction Prior to occupation of 35 th dwelling (Under Construction)
10/0346	01/10/10	Story Homes	Former Depot Station Road, Dandycroft, Station Rd, Brampton Parish - Brampton	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	At appropriate stage of development (Site complete awaiting confirmation from developer regarding laying out of on-site Open Space)

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					Maintenance sum of £14,204 (10 yrs from receipt.)	
09/0413 13/0207	15/11/10 23/07/13	Church Commissioners for England	Morton Development, Carlisle Parish – Cummersdale Ward - Various	Development for Residential (Maximum 825 Dwellings), Employment (40,000m2 Floorspace), And Public Open Space	See Appendix 1 Affordable Housing Open Space	Throughout Development (Await RM)
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 Parish – St Cuthbert's Without	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 (Permission renewed with DOV)
09/0815	07/04/11	Denton Business Park Ltd	Former storage & workshop buildings, Denton St, Carlisle Ward – Denton Holme	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	Cycle Network: £46,000 Sports Provision: £48,584 Other: Gates to the development to be designed by qualifying Students by way of a design competition	Both within 14 days of commencement. (Permission unimplemented app 14/0068 to discharge conditions)
10/0577	13/06/11	Dean Montgomery	Tarn End House, Talkin Parish - Brampton	Removal Of The Effects Of Conditions 2, 3, 4, 5 And 6 Attached To The Grant Of Full Planning Permission Under Application 06/0693	Affordable Housing Financial Contribution: Min £3,875 per dwelling linked to Nationwide House Price Index,	Payable on first occupation of each dwelling (Permission unimplemented)

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Outstanding	When Due/Comment
				(Conversion To 8no. Holiday Units) To Enable Unrestricted Residential Occupation		
09/1082	25/08/11	Tesco Stores Ltd and Cumbria County Council	Bowling Green Adj to Horse and Farrier Public House, Wigton Road, Carlisle Ward - Yewdale	Erection Of A Convenience Foodstore	Horse and Farrier Public House: Undertake works as specified in agreement before occupation of the store and procure marketing of the public house during the Marketing Period (6 months of occupation of the store)	(Technical start, but announced that will not proceed with the development)
11/0181	05/10/11	Greensyke Property Ltd	Kingswood Educational Centre, Cumdivock Parish - Dalston	COU of existing educational buildings to 7 dwellings and erection of 1 dwelling	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x 0.25	Payable 1 st occupation of relevant dwelling (Under Construction)
10/0164	19/10/11	Top Notch Contractors Ltd and Cumbria County Council	Former Prince of Wales Public House & Conversion of 102 Denton Street Ward – Denton Holme	Redevelopment to create 16 Apartments and 1 Commercial Unit	Outdoor Sports Facilities: £3,538 towards the improvement of outdoor sports facilities within the District.	14 days of commencement (Permission unimplemented)
11/0315 RM 12/0130	05/01/12 21/05/12	Personal Covenant	Land between Longlands and Stonelea, Greenwoodside, Smithfield Parish – Kirklington Middle	Live/Work Unit	Live/Work Unit:	(Under Construction)

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Outstanding	When Due/Comment
09/0617	05/04/12	Story Homes Limited and 2 other 'Covenanting Parties' (conditionally indemnified)	Grindledyke, Carlisle Ward – Stanwix Rural	Residential Development	<p>Affordable Housing: 81 – Social Rented 82 – Discounted (70% OMV)</p> <p>Open Space</p> <p>Transport Improvements Contribution: First contribution - £250,000</p> <p>Travel Plan: Implement and comply with the Travel Plan for that Phase.</p> <p>New School 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>Local Centre To be constructed</p>	<p>Throughout Development</p> <p>management scheme each phase</p> <p>Instalments</p> <p>Throughout development</p> <p>Construction to be undertaken by developer</p> <p>Prior to occupation of the 199th dwelling</p> <p>Prior to the occupation of more than 649 dwellings. (Phase 1 Under Construction)</p>
10/1026 14/0460	17/04/12 18/02/15	Persimmon Homes and Cumbria County Council	land to the Rear & West of Garden Village, Wigton Road, Carlisle, CA2 6QX	Residential Development Comprising The Erection Of 253No.	<p>Affordable Housing: 2 – Social Rented 58 – Discounted (70% OMV)</p>	Throughout Development

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Outstanding	When Due/Comment
			Parish - Cummersdale	Dwellings		(Under Construction)
11/0733	19/04/12	Personal Covenant	Iona, Gelt Road, Brampton, CA8 1QH Parish - Brampton	Demolition of existing workshop & stables; erection of 4 dwellings	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x 0.3	Upon 1st occupation of relevant unit. (Permission unimplemented)
10/1066	24/05/12	Citadel Estates Limited	Skelton House, Wetheral Parish - Wetheral	Demolition of exiting house, adjoining barn & outbuildings; erection of 15 2 bed apartments	Affordable Housing: 3 – Discounted (70% OMV) – plots 14, 15 & 17. Property Management Policy Public Open space & Relevant Works contribution [£3,000]	Throughout development To be in place prior to 1 st occupation Payable within 28 days of 1 st occupation (Under Construction)
00/0439	09/10/12	Persimmon Homes Limited and Cumbria County Council	Land at Peter Lane, Morton, Carlisle Ward – Dalston	Residential Development	Open Space Management Scheme: Public Open Space Contribution: Sum to be agreed subject to terms within agreement on adjacent site (09/0413).	To be approved prior to commencement of development. Payable within 28 days of agreement. (Under construction)
12/0847	27/02/13	Personal Covenant	Rear 1 & 2 Whitehouse, Walton, Brampton Parish - Walton	Residential Development	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x 0.3	Contribution payable upon first occupation of relevant unit. (Permission unimplemented)
11/0279	11/04/13	Diocesan Trustees	former Catholic Church of our Lady of Good Council, Burn Street, Longtown	Residential Development (9 Dwellings)	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x 0.3	Contribution payable upon first occupation of relevant unit. (Permission unimplemented)

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Outstanding	When Due/Comment
			Parish - Arthuret			unimplemented)
12/0678	16/04/13	Personal Covenant	Land between Lomond & Gladsmuir, Broomfallen Road, Scotby Parish- Wetheral	Erection of 3 dwellings	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x 0.3	Contribution payable upon first occupation of relevant unit. (Under Construction)
12/0811	26/04/13	Personal Covenant	Land adj Garth House, Greenfield Lane, Brampton Parish - Brampton	Erection of 5 dwellings	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x0.30	Payable upon practical completion of the 3rd relevant unit (for 3 units) and upon the 5th relevant unit (last 2 relevant units). (Under Construction)
12/0854	06/06/13	Personal Covenant	Adj Scaurbank, Netherby Rd, Longtown Parish - Brampton	Erection Of 14no. Dwellings (Including 3no. Affordable Dwellings)	Affordable Housing: Plots 1,2,10 @ 70% OMV. Open Space: £23,954	Throughout Development completion of the 8th Unit (Permission unimplemented)
10/0760	25/06/13	Personal Covenant	Helme Farm, Cumrew, Brampton, CA8 9DD Parish - Cumrew	Conversion Of Barns To Form 5no. Dwellings	Affordable Housing Financial Contribution: £34,000	Pay £6,800 within 4 months of completion of each dwelling (£34,000 in total) (Permission unimplemented)
12/0710	06/08/13	Cumbria County Council, Personal Covenanting Parties	Rear of Scotby Green Steading Parish – Wetheral	Erection Of 45no. Dwellings, Associated Open Space And Infrastructure	Affordable Housing: 1 @ 70% OMV remaining 3 Registered Provider	Throughout Development [3 @ 70% OMV completed to date] (Under Construction)

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Outstanding	When Due/Comment
13/0562	04/11/13	Magnus Homes Limited & Cumberland Building Society	Rear of Lime House, Wetheral Parish – Wetheral	Erection Of 6no. Dwellings	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x0.30 Waste Management Scheme	Payable upon practical completion of the 4th relevant unit for all 6 units Prior to 1 st occupation (Under Construction)
13/0450	28/11/13	Personal Covenant	West of Quarry House, Wetheral Pastures, Carlisle, CA4 8LE Parish – Wetheral	Erection of 3 dwellings	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x0.30	Payable within 10 days of the 1st occupation of the 1 st relevant unit (Under Construction)
13/0047	15/01/14	Story Homes Ltd	Buck Bottom Farm Burgh by Sands Parish – Burgh by Sands	Erection Of 3No. Dwellings, Conversion Of Barn To 1No. Dwelling	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x0.30	Pay Contribution for the 4 relevant units upon 1st occupation of the 3rd relevant unit (Permission unimplemented)
12/0878	31/01/14	Story Homes Ltd and Personal Covenants and County Council	Land between Townhead Road and Station Road, Dalston Parish – Dalston	Erection Of 121no. Dwellings, Associated Open Space And Infrastructure	Affordable Housing: 8 Low cost 12 Rented	Throughout Development (Under Construction)
12/0793	12/03/14	Cumbria County Council and Personal Covenants and Story Homes	Hammonds Pond, Oaklands Drive, Durdar Road, Carlisle Parish – St Cuthberts Without	Erection Of 318no. Dwellings	Affordable Housing: 31 Low cost 31 Rented	Throughout Development 4 @ 70% OMV delivered (Under Construction)
13/0496	06/03/14	Personal Covenant	Land to the east of Village Green	Erection Of 3no. Dwellings	Affordable Housing Financial Contribution:	Pay on all 3 units upon 1st occupation

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Outstanding	When Due/Comment
		Advised of change of ownership	Brunstock Parish – Stanwix Rural		Formula: (Market Value x 0.1) x0.30	of the 2nd relevant unit (Under Construction)
13/0787	24/03/14	Personal Covenant	Land at Orchard Gardens, Houghton, CA3 0LH Parish – Stanwix Rural	Development of approx 6 bungalows OUT	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x0.30	Pay Contribution upon 1st occupation of the relevant unit (Await RM)
13/0655	24/03/14	Top Notch contactors Ltd and Svenska Handlebanken AB (Publ)	Former Dairy Site, Holywell Crescent, Botcherby, Carlisle, CA1 2TD Ward – Botcherby	Residential Development (Outline Application)	Wheeled Refuse Bins: secured the purchase and delivery of wheeled refuse bin for each unit Sports & Play Provision Contribution Capital Element: £71,892 (index linked) Sports & Play Provision Contribution Maintenance Element: £35,946 (index linked)	Prior to 1st 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 (Await RM)
13/0762	27/03/14 Planning Permission 02/04/14	Personal Covenant	land to the east of Croftlands, Allenwood, Heads Nook Parish – Hayton	OUT – indicative 3 dwellings	Affordable Housing: 1 Low Cost @ 70% OMV	During development (Await RM)
13/0728	24/04/14	Personal Covenant	Land rear of Hallcroft, Monkhill Parish - Beaumont	Erection of 7 no Dwellings	Affordable Housing: 2 @ 70% OMV	Throughout Development (Permission unimplemented)
12/0928	28/05/14	Personal	Land at How End	Conversion of	Affordable Housing	Payable upon first

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Outstanding	When Due/Comment
		Covenant	Farm, Longtown Parish - Arthuret	Agricultural Buildings to provide 3 no residential units	Financial Contribution: Formula: (Market Value x 0.1) x 0.3	occupation of 3 rd relevant unit. (Permission unimplemented)
13/0534	06/06/14	Personal Covenant	Land adj The Oaks, Plains Road, Wetheral Parish – Wetheral	Erection Of 3no. Dwellings	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x 0.3	Payable upon first occupation of any relevant unit (Permission unimplemented)
13/0841	11/06/14	Personal Covenant	Land behind Townfoot Farm, Castle Carrock Parish – Castle Carrock	Erection Of 4no. Dwellings	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x 0.3	Payable upon first occupation of any relevant unit (Under Construction)
13/0546 14/0490	19/06/14 16/09/14	Esh Developments Ltd	Land adj to Fallowfield, Plains Road, Wetheral Parish - Wetheral	Erection Of 3no. Dwellings	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x 0.3	Payable upon first occupation of any relevant unit (Permission unimplemented)
13/0905	02/07/14	Personal Covenant	Rear 55-56 Scotby Road, Scotby Parish– Wetheral	Erection Of 45no. Dwellings, Associated Open Space And Infrastructure	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x 0.3	Payable upon first occupation of 2 nd relevant unit. (Permission unimplemented)
13/0559	04/07/14	Personal Covenant	Field East of the strand, Aglionby Parish– Wetheral	Erection of Dwellings [outline]	Affordable Housing: 1 @ 70% OMV	Throughout Development (Await RM)
12/0832 14/0717	06/03/14 and DOV 25/07/14	Personal Covenant	Adj 445 Durdar Road, Carlisle Parish– St Cuthberts Without	Erection Of 5no. Dwellings	Affordable Housing: 1 @ 70% OMV Maintenance Contribution: £1,000 maintenance of green and swings at Blackwell Common.	Throughout Development Payable prior to occupation of 3rd unit (Permission unimplemented)

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Outstanding	When Due/Comment
10/1116	18/08/14	Stobart Air Limited and Cumbria County Council	Carlisle Lake District Airport Parish– Irthington	Erection of Distribution Centre and raised and re-profiled runway	Habitats Contribution: £100K	Payable upon occupation OR within 14 days or written request from /council (Under Construction)
13/0778	02/10/14	Cumbria County Council and Cumberland Property Services Ltd and Aldi Stores Ltd	Land at Dalston Road, Carlisle Ward – Denton Holme	Erection of a Foodstore	Alley Gate Contribution: £2,500 [indexed]	Payable prior to commencement of resident's parking area (Under Construction)
13/0865	23/10/15	Personal Covenant and REG Windpower Ltd	Land at Hallburn Farm, Longtown Parish – Arthuret	Six Wind Turbines With A Tip Height Not Exceeding 126.5m,	Habitat Outline Management Plan: maintains the Habitat Site	Throughout 25 years of operation.
12/0856	12/11/14	AP & J Brown	L/A Beech Cottage, Cumwhinton Parish – Wetheral	Erection Of 15no. Dwellings Including 3no.Affordable Bungalows And 1no. Dwelling For The Elderly	Affordable Housing: 3 @ 70% OMV Provision of Play Equipment Contribution £5K	Throughout development payable within 28 days of commencement (Permission unimplemented)
13/0950	12/11/14	North Homes and Personal Covenants	Rear 46 Broomfallen Road, Scotby Parish – Wetheral	Erection Of 3no. Dwellings (Outline)	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x 0.3	Payable upon first occupation of 2 nd relevant unit. (Await RM)
14/0316	02/12/14	Personal Covenant	Land between Wetheral Methodist Church & Redcroft, Wetheral Parish – Wetheral	Erection Of 3no. Dwellings	Affordable Housing Financial Contribution: Formula: (Market Value x 0.1) x 0.3	Payable upon 1 st occupation of the relevant unit. (Permission unimplemented)

PP No	Date Signed	Parties	Address	Development Proposal	S106 Obligation Outstanding	When Due/Comment
14/0329	17/12/14	Impact Housing Association	Irthing Centre, Union Lane, Brampton Parish – Brampton	Demolition Of Former Business Centre & Single Storey Link Wing; Construction Of 38No. Extra Care Residential Units Including Communal And Support Facilities	Extra Care Units: for rent [age restriction 55 unless exceptional circumstance] Lettings and Disposal Policy	To be submitted prior to occupation (Permission unimplemented)
14/0816	17/03/15	Magnus Homes & Cumberland Building Society	Rear of Thornedge, Station Road, Cumwhinton Parish – Wetheral	Demolition Of Existing House And Stables; Erection Of 22no. Dwellings	Affordable Housing Plots 15,16,19. Low Cost Housing Scheme to be submitted prior to commencement Provision of Play Equipment Contribution £5k	Throughout Development Payable prior to the completion of 14 residential units (Permission unimplemented)

APPENDIX 1

TRIGGER	COVENANT	PARA
Pre- Commencement		
4 Months prior commencement 1 st Phase (and subsequent phases)	Owner serve notice on the Council detailing its election under para 3.2 (affordable housing provider)	3.2
Phases		
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
Housing Development/Occupation		
Not to Occupy Any Dwelling	£5k Newlathes Avenue Bus Stop Contribution has been paid.	County 10.1
Occupation of 50 th Dwelling and every 50 th Dwelling thereafter	Owner notify the County Council	County 12.10
Occupation of 101 Dwellings	£120k Bus Service Capital Contribution	County 6.1
Occupation of 185 Dwellings	Bus Service Not to be operated prior to occupation of 185 dwellings	County 5.1
	£100k Pedestrian Connectivity Contribution	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 Upon receipt of the notice the owner shall pay £110k being the 1 st instalment of the Bus Revenue Contribution £110K on 1 st anniversary of 1 st instalment £110K on 2 nd anniversary of 1 st instalment	County 8.3 8.1 8.1 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 th Dwelling but prior to Occupation of the 400 th Dwelling or 10 yrs from	County can serve written notice that it requires the School Site. If served prior to 28 th dwelling then the	County 12

commencement (whichever the earliest)	owner shall not occupy more than 360 Dwellings until obligations 12 para 12.3 have been complied with. If served after occupation of 280 th dwelling then owner shall not occupy more than an additional 80 dwellings until obligations under para 12.3 have been complied with.	
Occupation of 256 Dwellings	£30k Bridging Payment if CNDR Roundabout is not in operation	County 4.2
	£50K 1 st Instalment of Modal Shift Contribution (reduce by Bridging Payment if paid)	County 10.2
	£20k McVities Roundabout Contribution	County 10.1
	£25k Traffic Signals Contribution	County 10.1
	£30k 1 st Instalment Cross City Bus Route Improvement Contribution £35k 2 nd instalment on 1 st Anniversary of occupation of 256 th dwelling £35k 3rd instalment on 2 nd Anniversary of occupation of 256 th dwelling Any Unexpended sum on 3 rd anniversary to be returned to the payer.	County 9.1 5 th Schedule 2.2
	If the Bus Service is NOT operational any unexpended sum of the Bus Service Capital Contribution (£120k paid on occupation of 101 st dwelling) shall be returned to the payer within 1 month of such occupation.	County 2.2
Occupation of 300 Dwellings	£50K 2 nd Instalment of Modal Shift Contribution	County 10.2
After the Occupation of the 360 th Dwelling and before Occupation of the 400 th Dwelling.	Owner pay the Education Contribution (Department for Children Schools and Families Cost Multiplier – [or equivalent]) by 159	County 12.7
Occupation 450 Dwellings	£62,813 3 rd Instalment of Modal Shift Contribution	County 10.2
Occupation 742 Dwellings	Not to occupy until owner has paid £4,928 per HA (Primary Leisure Area Maintenance Contribution). 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

Other		
Employment Units	Not to be occupied until: £5k Wigton Road Bus Stop Contribution 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	