

Masterplanning Proof of Evidence - Summary

Project Ref.:	The Lanes / Pickerings Farm Site, Flag Lane, Penwortham REF CD10.64
Location:	Penwortham, South Ribble
Issued By:	Adam Thornton
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1. I, Adam Thornton, am a Founding Director of 5plus Architects. I am a member of the RIBA, a Lecturer at London Metropolitan University and an External Examiner of Professional Practice at both The University of Nottingham and London Metropolitan University.
2. This summary of Proof of Evidence concerns Appeal Refs APP/F2360/W/22/3295498 & 3295502, lodged in respect of two applications for outline planning permission refused by South Ribble Borough Council in November 2021(South Ribble Borough Council Planning References 07/2021/00886/ORM and 07/2021/00887/ORM).
3. The Proof of Evidence demonstrates that a process of clear analysis and conceptual development was undertaken and that the proposals put forward within the submitted Masterplan (**CD1.16**) and Design Code (**CD1.17**) associated with the two applications constitute a wholly appropriate and sustainable design response to policy and guidance and for the site.
4. On 14 April 2009, I was employed by Taylor Wimpey to undertake 'Masterplanning and Architectural Services' for a site extending to approximately 61 hectares of developable land. The land was designated as 'Safeguarded' and was included in the Council's SHLAA.
5. The brief was to develop an initial masterplan and Development Statement setting out how the Masterplan Site could become a residentially led, mixed used development. The Development Statement was required to be suitable for submission to the Council to inform the preparation of its next Local Plan.

6. A Development Statement was produced in March 2011. An illustrative masterplan was included as part of this Development Statement. This was a joint document on behalf of both Taylor Wimpey and the Homes and Communities Agency (HCA), now known as Homes England; This was submitted to the Council as part of the representations made supporting the allocation of the land for development through the local plan-making process.
7. The Development Statement referred to a considerable body of technical investigation undertaken and concluded that there were no technical, physical or environmental factors that would prevent the development of the site.
8. The location of both the Local Centre, and Two Form Entry Primary School are shown on this initial masterplan and remain in almost identical locations in the masterplan for the Appeal Proposals. This masterplan in 2011 was made available to assist the Council in concluding that the site was suitable for inclusion in its then emerging Local Plan as a major housing allocation.
9. In February 2018, I was re-approached jointly by Taylor Wimpey and Homes England to revisit the proposals for the Site and produce a Masterplan, Design and Access Statement and Design Code to accompany an outline planning application.
10. Although a lot of the design and technical considerations were still valid for the Masterplan Site, it was agreed that the key variable was the local community. No engagement had been undertaken since 2011 by the Client Team.
11. The agreed approach was to start with a Visioning Exercise involving the local community. The principle was to start with a blank piece of paper, the Local Plan allocation for residential development, and the opinions of local residents and businesses both within the Masterplan Site and adjacent to it.
12. The Visioning consultation ran for a period of five weeks between Tuesday, 26th June and Friday, 20th July 2018 and included two Public Exhibitions held on Tuesday, 10th July and Friday, 13th July 2018. A series of focus meetings with residents and landowners, Officers and Members at SRBC and LCC and other stakeholders including Penwortham Town Council also took place during the consultation exercise. A website was also created and has been kept live and updated since the launch of the consultation.
13. The early consultation and engagement helped the Design Team to understand better the local needs for the Masterplan Site. Having gained very useful insight into the complexity and history of the site from the Local Community, the Design Team were keen to update the initial Masterplan from 2011 taking account of the outputs from this exercise.
14. As the masterplan emerged, it was subject to regular internal design reviews within 5plus architects with amendments made to reflect the feedback received. Additionally, to ensure the integration of Landscape appropriate proposals, Xanthe Qualye, of Xanthe Qualye Landscape Architects, was appointed as a sub-

consultant to 5plus Architects. This collaboration between architect and landscape architect from the beginning has ensured a rich masterplan proposal.

15. The key development from the 2011 Masterplan was the separation of development traffic from the existing lanes. Instead of using the lanes for access to new homes, a separate highway network was introduced. This allowed for the character of the lanes to be retained as much as possible. In the revised proposals these would be used as sustainable movement corridors. This was also in line with the C1 Policy Map which depicted the line of a spine road that did not utilise the existing adopted road network.
16. The draft Masterplan included a mix of uses, including a school, community centre, elderly care and other non-residential depicted in brown in the diagram above. The draft masterplan was submitted to South Ribble Borough Council for consideration in March 2019.
17. South Ribble Borough Council were keen to ensure this draft Masterplan was subject to a period of formal consultation before they considered it. The Draft Masterplan was widely discussed with the Council and at no point did they communicate that they disagreed with the clearly set out Vision for the site. Their Planning Committee endorsed the draft Masterplan for consultation on Wednesday 7 November 2019.
18. In response to the feedback provided at a meeting with SRBC on 24 Jan 2019, the team presented a revised masterplan a the course of the next 9 months, the Design Team continued to review, discuss, and develop the Draft Masterplan, culminating in the submission of the Masterplan Document in December 2019 **(CD7.8)**.
19. A second version of the Masterplan incorporating comments was submitted in August 2020. **(CD7.10)**
20. In parallel with the Masterplan Document, the team also developed the Design Code for the site as required by Policy C1. **(CD7.9)**
21. The Design Code has been divided as follows:
 - i. Site Wide Design Principles
 - ii. Character Area Design Principles
22. Some themes, including the review of surrounding and internal architectural and landscape character areas follow on from the original Development Statement. For example, the character to the north of the site relating to Bee Lanes and Kingsfold, the East being more urban with less context, and the south and west edges being more in keeping with the rural Green Belt proximity were all identified in the original Development Statement.
23. The first version of the Design Code that was issued to SRBC was co-ordinated and submitted in November 2019 **(CD7.9)** alongside the Masterplan of the same date. The Design Code was available for consultation in the same way that the Masterplan document was available.

24. This document was also endorsed alongside the draft Masterplan for formal public consultation on Wednesday 7 November 2019.
25. A second version of the Design Code incorporating comments was submitted in August 2020. **(CD7.11)**
26. The Masterplan **(CD7.10)** and Design Code **(CD7.11)** were rejected by South Ribble Borough Council on 17 September 2020. The key reasons for reject are listed below:
 - i. outstanding matters to be addressed in the Local Highway Authority response;
 - ii. Network Rail are still to address the use of the Bee Lane and Flag Lane railway bridges;
 - iii. Highways England are still to address issues of the impact on the Strategic Road Network;
 - iv. Members were not satisfied with the wide spread of 3 and 4 storey buildings shown on the Building Heights Parameters Plan;
 - v. developers to provide certainty with regard to deliverability especially with regard to key infrastructure such as highways, sustainable access, education, community facilities, sports provision and affordable housing;
 - vi. increase the amount of Green infrastructure and Public Open Space which respects the rural character of the area and protects the high quality elements such as the Orchard including firm commitment for the retention of Orchard site;
 - vii. firm commitment to retain all existing hedgerows and trees of A and B category;
 - viii. ecology surveys of whole of Masterplan site, regardless of ownership and including Safeguarded Land; and
 - ix. further consideration of proposal to discharge surface water to Mill Brook.
27. I note that the only 'design' matters referred to above were building heights, the quantity of public space being provided, the retention of the orchards and the retention of hedgerows and trees. Each of these were addressed in the Design Codes submitted as part of the Design and Access Statement for the two Appeal sites.
 - i. Building Heights – The refused Design Codes showed height up to 4 Storeys. The two appeal sites being considered now show a maximum height of 3 storey with this reducing to 2.5 storey within proximity of existing development. This is shown on drawing 05745_MP_00_1002-102 **(CD1.4)**. This has been tested in the Environmental Statement within the LVIA and is considered acceptable.
 - ii. Public Open Space - The quantity of public space is clearly defined in the appeal site Masterplan document. On page 28 of the Masterplan Document **(CD1.16)**, the amount of POS required by policy is calculated as 10.77h. The amount provided by the Masterplan is demonstrated as 22.23h. The Masterplan therefore provides twice as much POS as required by policy.

- iii. Retention of the Orchards – Two areas of the Masterplan are designated as Orchard. These have now both been retained in the Masterplan.
 - iv. Retention of Hedgerows and Trees – TEP undertook a Tree and Hedgerow survey across both Appeal Sites. The Appeal Sites demonstrate very clearly where tree removal is required. The only Category A tree removals are proposed to the edge of the Penwortham Way; this is essential to implement Policy C1 with a highway connection onto Penwortham Way. Within the masterplan several category B trees are identified for removal, with commentary on why these are needed, and suitable mitigation proposed.
28. In my opinion, all design related matters highlighted in the refusal of the 2020 Masterplan have been addressed in the documents submitted for the Appeal Sites.
29. The final version of the Masterplan and Design Code were submitted alongside two outline planning applications. The submitted documentation includes the following:
- i. Masterplan Document Dated August 2021 (**CD1.16**)
 - ii. Design Code (Chapter 8 and 9 of the Design and Access Statement) Dated August 2021 (**CD1.17**)
30. The key themes in the Masterplan are précised below:
31. A new place rooted in the existing context: The Masterplan proposes the creation of a new neighbourhood based on the existing urban fabric. The technical site studies, review of landscape, and existing routes and connections across the sites have all been considered in the masterplan. The Masterplan is respectful of the existing Public Rights of Way, and the existing structure of the site. Generally the masterplan works with the existing field patterns and landownership patterns to promote continuity. So many masterplans take an eraser to the site structure; this masterplan does not. It seeks to build a new place built upon the rich tapestry of the existing.
32. A place to settle down, A place for the future: The vision for the site is to provide a new place with all the ingredients needed to create a sustainable community. The residential-led development can include a full range of quality homes, intended as somewhere to settle down and somewhere for the future. The health and well-being of both the existing and new residents is central to the masterplanning and decision-making process. The layout and proposed uses for the site can be future proofed for generations to come. There is an opportunity here to integrate digital and smart technology, thus ensuring that there is suitable space to create opportunities to substitute trips (i.e. can I do it online, can I do it online and have it delivered, can I do it locally).
33. This is a framework for the future upon which future applications can be tested. The sites will be developed gradually over time, with each Reserved Matters application or Detailed application tested against this principle. Has a full range of quality homes been provided to ensure a diversity of occupation, the ability to

move from a starter home to a family home and beyond? Have the detailed proposals considered the digital, energy, sustainability and our relationship with technology?

34. A new neighbourhood: Well defined public and private spaces will allow the community to have a sense of identity and character. In addition, a range of new community facilities and services embracing the “20-minute town” and “local living” concepts will also provide vital connection points to thread together the development and bring social cohesion. The location of the neighbourhood facilities is well located at the intersection of the lanes, the public right of ways and sustainable methods of transport. The neighbourhood centre will serve the new community but will be within a short walk for some of the existing residents of Kingsfold too. The diagram on page 11 of the masterplan (**CD1.16**) shows the walking routes to the new centre, with a maximum distance of 750m. At a typical walking speed of 5kpm the new centre would therefore be an approximately ten minute walk for someone with of average walking speed.
35. A well-connected place: The Masterplan gives opportunity to develop a well-connected neighbourhood. Using the existing lanes and footpaths, it is possible to create a range of green spaces providing a wealth of different environments. More formal parkland and informal areas to support an abundance of wildlife can be integrated into the Masterplan. This green infrastructure must be well connected to the surrounding areas.
36. The movement strategy for the Masterplan purposefully prioritises non-car movements to ensure that places are actively connected. The principal of a bus route through the Masterplan has always been indicated, and as set out in Mr Axon’s evidence, further discussion with bus companies shows a desire for this to be implemented. The scheme knits itself into the established road network and the existing public footpath network. The scheme makes new connections to the north and allows strong new diagonal and circular walking route connections as part of the wider Penwortham circular walking and cycling route.
37. A place that encourages activity: The Masterplan layout is based on Active Design Principles. It needs to be easier to walk, cycle or use public transport to get to where you need to be. The Masterplan puts an emphasis on turning the existing lanes into sustainable pedestrian and cycle friendly routes; the vast majority of new vehicular traffic will be prevented from using the existing lanes. The green spaces and routes will also support the growth of a community to stay fit and active.

The Masterplan has been tested against the 10 principles of Active Design. I am satisfied that the Masterplan and Design Codes meet with the 10 Active Design Principles at the appropriate level of detail that a Masterplan should. The framework set out in the Masterplan does not preclude the future detailed development of any of the sites being brought forward successfully within these principles.

38. The location of the entrance from Penwortham way is reviewed in detail, and I am satisfied that from a design perspective it is well located.
39. The relationship of existing dwellings and premises to the masterplan is reviewed. I am satisfied that from a design perspective this provides adequate guidance and reassurance regarding this relationship.

40. The Masterplan has been reviewed by the Masterplan Development and Design (MDD) Team at Homes England. This team is responsible for promoting and advocating design quality in general and with respect to projects across the Homes England Agency; with Building for a Healthy Life being used as the benchmark document to appraise the design qualities that any site design / masterplanning is delivering.
41. The MDD Team confirmed that the layout of the Pickering's Farm masterplan demonstrates significant design features that align to good placemaking and transport planning / design. The MDD Team confirmed that overall, therefore, the site has been designed in alignment with a vision and validate approach; that places a sustainable transport vision and operation, with car trip internalisation and minimisation as a key outcome from design of the place.
42. I have reviewed the Reasons for Refusal (RfR) and the Main Issues raised by the Inspector. Only Main Issue One relates to the Masterplan and Design Code, with reference back to RfR5. No specific design objections were cited at the time, but I have received further clarification on 1 July 2022.
43. As part of the Inquiry Process, the Council have tabled commentary on the Masterplan. I am pleased to see they agree that 'the masterplan vision is a good one' in the email received from Chris Sowerby dated 1 July 2022. In relation to the queries raised, I have answered these through a series of questions.
44. Is it acceptable for only parts of the masterplan to come forward? This is the very nature of a masterplan. A masterplan provides an overall framework for comprehensive and holistic delivery of a wider site area. A masterplan is specifically used for this purpose to ensure that the wider considerations are incorporated. The two appeal sites accord completely with this masterplan.
45. Is the Masterplan compromised by partial delivery of Sites A and B only? This is not the case at all. Since both Site A and Site B are submitted at the same time as the masterplan, they are wholly in accordance with the masterplan. In my opinion there is nothing contained within Site A and Site B that would compromise the masterplan.
46. Will the delivery of Sites A and B have a major negative effect on the delivery of the vision? The result of delivery of Sites A and B would have quite the opposite effect. In no way would the delivery of Sites A and B have a major negative effect. In fact the delivery of Sites A and B would have a major positive effect of the delivery of the vision. The delivery of Sites A and B would deliver the main vehicular access into the masterplan, would improve the pedestrian and cycle network for active travel, would resolve a number of the technical issues around surface water, and would provide key community elements such as the open spaces and provision of community facilities. I fail to understand how this can be seen to have a major negative effect on the delivery of the masterplan vision.
47. Regarding the Spine Road, I am content that the level of detailed consideration of the spine road, and the level of detail relating to the spine road itself is sufficient for masterplanning and design coding purposes.

48. Regarding local context, the first and third vision principles of the masterplan direct the urban form and design to be something new; a new place and a new neighbourhood. For the majority of the masterplan and the four character areas there is little urban context save for the buildings already within the Masterplan Site and directly adjacent in three specific locations.
49. In my opinion, the character area proposals adjacent to the three areas of existing development are entirely in keeping and appropriate to context. Final selection of materials would be subject to reserved matters.

Does the masterplan meet Local Policy Requirements of Policy C1?

50. The Policy requires that the Masterplan must include the wider area of the Pickering's Farm site which includes the safeguarded land which extends to Coote Lane as shown on the Policies Map and make provision for a range of land uses to include residential, employment and commercial uses, Green Infrastructure and community facilities.
51. This Policy objective has been the starting point for the brief for the Masterplan. The red line boundary is exactly as defined in the policy, and the proposal refers to the range of land uses requested by the Policy. The Masterplan therefore completely meets the objectives of Policy C1.

Does the Masterplan and Design Codes meet with other relevant Policies?

52. From the brief review set out in the evidence, the proposals clearly accord with the development plan's objectives and requirements.

Does the masterplan accord with 'Building for a Healthy Life'

53. The Masterplan and Outline application were reviewed by the team against criteria set out in the 'Building for a Health Life' standards and against the 'National Design Guide'. Our demonstration of how this is achieved has been included in the Design and Access Statement in Chapter 10. No adverse commentary has been received regarding our assessment, and no clarifications on this review has been sought by the Council. This was also a focus of the Homes England MDD review, which found the scheme could be brought forward in accordance with these standards.