

# Westmorland and Furness Council Infrastructure Funding Statement 2022-2023

For the former sovereign Councils of Barrow Borough Council, Eden District Council, South Lakeland District Council and Cumbria County Council

# Contents

Westmorland and Furness Council Infrastructure Funding Statement .....	1
2022-2023 .....	1
Contents .....	2
1. Introduction .....	3
1.1 Purpose .....	3
1.2 Context .....	4
1.3 Structure .....	5
2. South Lakeland District excluding the Lake District National Park and the Yorkshire Dales National Park .....	7
2.1 Relevant Local Plan Policies, evidence base, planning policy guidance and studies .....	7
2.2 Section 106 Agreements.....	8
2.3 Community Infrastructure Levy (CIL) .....	15
3. Barrow Borough .....	23
3.1 Relevant Local Plan Policies, planning policy guidance, evidence base and studies .....	23
3.2 Section 106 Agreements.....	24
4. Eden District excluding the Lake District National Park and the Yorkshire Dales National Park .....	28
4.1 Relevant Local Plan Policies, evidence base, planning policy guidance and studies .....	28
4.2 Section 106 Agreements.....	30
5. Cumbria County Council .....	34
5.1 Relevant Local Plan Policies, planning policy guidance, evidence base and studies .....	34
5.2 Section 106 Agreements.....	35



# 1. Introduction

## 1.1 Purpose

- 1.1.1 An Infrastructure Funding Statement (IFS) is a document that must be published at the end of each calendar year for the preceding financial year (the ‘reported year’) by local authorities which receive money or in-kind works from Section 106 Agreements or issue a Community Infrastructure Levy (CIL) liability notice. This means that generally all local planning authorities need to produce an IFS, including County Councils. Such local planning authorities are also referred to as ‘contribution receiving authorities’.
- 1.1.2 The requirement to publish an Infrastructure Funding Statement (IFS) was introduced in 2019, with the first IFSs published at the end of 2020 for the reporting year 1 April 2019 to 31 March 2020.
- 1.1.3 The IFS gives local planning authorities and communities an insight into how developer contributions are supporting new development and local infrastructure in their area. It also improves transparency in monitoring and reporting on the collection, allocation and spending of developer contributions and assists in demonstrating the local planning authority is doing this effectively and lawfully.
- 1.1.4 Section 106 Agreements (also referred to as ‘planning obligations’ or ‘developer contributions’) are legal agreements that may be entered into with a developer by a local planning authority to mitigate the impacts of the development, including on infrastructure, and to secure outcomes such as the delivery of affordable housing. They are attached to the planning permission.
- 1.1.5 A CIL is a charge (also referred to as ‘developer contributions’) that can be levied by local planning authorities on new development in their area and is an important tool to help deliver the infrastructure needed to support development in the local planning authority area. The levy applies in areas where a local authority has consulted on, approved, and published a charging schedule which sets its levy rates. Within Westmorland and Furness, a CIL charging schedule is in place only within the local planning authority area of the former South Lakeland District Council (outside the National Parks).
- 1.1.6 The main focus of the IFS is to provide information on what happened in respect to:
- Obligations that have been entered into in the reported year
  - Money that has been received in any year but not spent
  - Monies that have been allocated but not spent during the reported year
  - Money that has been spent during the reported year



- 1.1.7 In addition, where a local planning authority has a CIL, the IFS must combine its CIL Report and other information relating to the CIL within the IFS.
- 1.1.8 In many instances local planning authorities will also produce and publish files ('csv files') that contain the raw data that informed and sits behind the IFS although this is not a mandatory requirement. These are published separately alongside the IFS on the local planning authority's website.

## 1.2 Context

- 1.2.1 Following a statutory reorganisation process, the former sovereign Councils of Barrow Borough Council, Eden District Council, South Lakeland District Council and Cumbria County Council were abolished on 31 March 2023 and from 1 April 2023 the statutory functions of those councils were transferred to Westmorland and Furness Council for the new unitary authority area.
- 1.2.2 The newly formed Westmorland and Furness Council area also includes areas of the Lake District National Park and the Yorkshire Dales National Park. The National Park Authorities are the local planning authorities for their respective park areas and have separate responsibility for the publication of an IFS for their respective Park Authority area.
- 1.2.3 Map 1 in paragraph 1.3.2 of this IFS shows the boundaries of the new Westmorland and Furness Council area and the former sovereign Councils along with the geographic extent of the National Parks.
- 1.2.4 This IFS is presented and published in a 'consolidated' form to include each of the former sovereign Council areas and has been published as the collective / combined IFS for each of the former sovereign Councils.
- 1.2.5 Where possible, the format of each 'respective IFS' has been aligned to assist with moving to a single IFS for Westmorland and Furness Council in the next reporting year. However, each of the IFSs have been produced in different ways to date and therefore may differ in content and how they are presented in this IFS. Particularly:
- the former County Council sought developer contributions within the National Park areas in respect to its functions e.g. as the Highway Authority, Lead Local Flood Authority and/or Education Authority, whereas each of the former district / borough councils only sought developer contributions for development within their respective local planning authority areas i.e. outside of the National Park areas;
  - the former Cumbria County Council's IFS has been disaggregated to include only the geographic area of Westmorland and Furness Council, reflecting that the balance of the former Cumbria County Council area is now located within the Cumberland Council area;



- the former South Lakeland District Council was the only Council to levy charges under a CIL;
- not all of the former sovereign councils prepared and published the raw data / csv files.

## 1.3 Structure

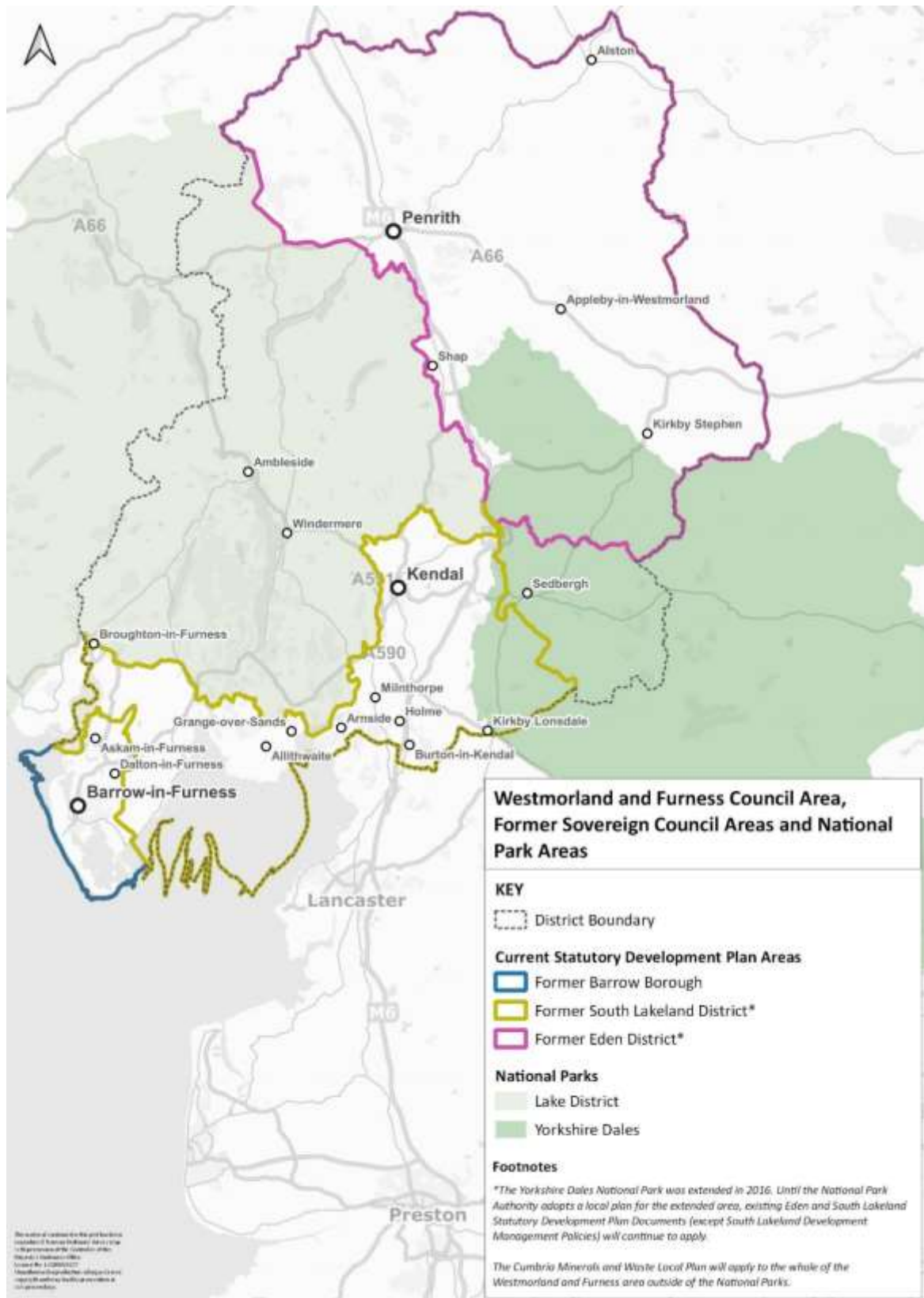
1.3.1 The IFS has been structured to reflect the former sovereign Council areas and to accommodate the differences in previous reporting. This will also allow for continuity in reporting and critically the ability to compare reported positions between the current 2022/2023 reporting year and last reporting year of 2021/2022 for each of the respective Councils.

1.3.2 Accordingly the IFS has been structured on the following geographic / former sovereign Council areas as follows and as shown on Map 1 below:

- South Lakeland (excluding National Park areas)
- Barrow
- Eden (excluding National Park areas)
- Cumbria County (whole of Westmorland and Furness Council area including National Park areas).



Map 1: Westmorland and Furness Council Area, Former Sovereign Council Areas and National Park Areas



## 2. South Lakeland District excluding the Lake District National Park and the Yorkshire Dales National Park

### 2.1 Relevant Local Plan Policies, evidence base, planning policy guidance and studies

2.1.1 The South Lakeland Local Plan 2003-2025 includes a policy (Core Strategy CS9.2) that requires new developments to secure improvements which are necessary to make the development acceptable, through planning condition or obligation (S106). The policy specifies a range of infrastructure types that developments might be expected to provide on-site, or off-site through S106 obligations, these are:

- Transport relating to highways/roads, rail, waterways, bus/other vehicular public transport, cycle, bridleway and pedestrian access and the securing of Travel Plans
- Waste recycling and management facilities
- Water facilities
- Drainage and flood defence/prevention measures
- Other utilities such as gas, electricity and telecommunications services
- Health Care facilities
- Education including local labour, training initiatives and childcare
- Community facilities
- Recreation provision (including open space, allotments, play and sport facilities)
- Biodiversity
- Enhancement of the public realm

2.1.2 As outlined in section 2.3, South Lakeland District Council adopted a Community Infrastructure Levy in 2015 to be used to also help fund provision and enhancement of infrastructure. The CIL Infrastructure Funding List included in section 2.3.27, specifies which types of infrastructure should be funded by CIL (either fully or in part).

2.1.3 Core Strategy Policy CS6.3 specifies requirements for affordable housing from new development. The policy specifies on schemes of nine or more dwellings in the Principle and Key Service Centres (Kendal, Ulverston, Grange-over-Sands, Milnthorpe and Kirkby Lonsdale), and three or more dwellings outside of these areas, no less than 35% of the total number of dwellings proposed should be affordable. In the Arnside and Silverdale AONB, policy AS03 of the Arnside and



Silverdale AONB Development Plan Document specifies a requirement for 50% affordable housing on schemes of 2 or more dwellings. S106 agreements are used to secure affordable housing either through on-site provision in most cases or off-site through a commuted sum.

- 2.1.4 The South Lakeland Infrastructure Delivery Plan 2017 sets out the strategic infrastructure requirements to support the delivery of the current South Lakeland Local Plan. Most S106 agreements relate to site specific infrastructure requirements arising from development impacts within the immediate local area. The most common types of infrastructure which S106 agreements are used to secure improvements to or provision of include open space / play space, sustainable transport e.g. footpaths, highways improvements, school transport, school places, and open space maintenance.

## 2.2 Section 106 Agreements

### Obligations that have been entered (agreed) into in 2022-23

- 2.2.1 Two obligations have been entered into in 2022-23. One obligation relates to an off-site recreational open space enhancement in association with a permission for housing development on part of the Kendal Parks allocation site in Kendal. The other obligation is for off-site, affordable housing provision in association with a permission for housing development at Graythwaite Manor, Grange-over-Sands.

Planning Application	Item	Amount (£)
SL/2018/0959	Open Space – enhancement of off-site recreational space – relating to Off Kendal Parks Road, Kendal housing development	6,000.00
SL/2018/0144	Off-site Affordable Housing commuted sum, relating to Graythwaite Manor, Grange-over-Sands housing development	35,093.00
TOTAL		41,093.00

### Money received through planning obligations received in 2022-23

- 2.2.2 Money was received from a planning permission for housing development at Sandylands Road in Kendal, for landscape maintenance.





Planning Application	Item	Amount (£)
SL/2007/1354	Landscape maintenance relating to housing development at NE Sandylands Road, Kendal	32,400.00
TOTAL		32,400.00

### Money spent through planning obligations in 2022-23

- 2.2.3 S106 monies have been used to improve the Hayclose Road play area in Kendal. A new fence around the perimeter of the play area was installed in 2022.



Figure 1: New fence around Hayclose Road play area, Kendal

- 2.2.4 Monies from the North of Sycamore Drive, housing development in Endmoor have been used to improve the play area in Endmoor. This is a parish owned play area.



Figure 2: Improved play area, Endmoor

2.2.5 Monies from S106 obligations relating to the Sainsbury's development on Shap Road, Kendal have contributed towards improvements at the entrance to and along Stramongate. This scheme is currently in progress utilising remaining S106 monies available and other sources of funding.

2.2.6 The table below shows all S106 monies spent in 2022/23.

Planning Application	Item	Amount (£)
SL/2012/0566 and SL/2015/0085	Open Space Maintenance at 'The Oaks', housing development, Kendal	3,500.00
SL/2008/1061	Open Space Maintenance at Grange Fell Road housing development, Grange-over-Sands	350.00
SL/2015/0085	Open Space improvements new fencing at Hayclose Road play area, Kendal	10,620.19
SL/2017/0841	Open Space improvements at Endmoor play area	39,083.94

Planning Application	Item	Amount (£)
SL/2013/1120	Towards a public realm and junction improvement scheme at the entrance to and along Stramongate off Blackhall Road, Kendal. Includes a ramped shared area access and street scaping with new tree planting.	29,303.72
TOTAL		82,857.85

**Monies received through planning obligations received and retained (unspent) as at end of 2022-23**

2.2.7 The table below indicates the moneys held from S106 obligations unspent as at the end of March 2023.

Planning Application	Item	Amount (£)
SL/2013/0830	Affordable housing commuted sum	56,180.53
SL/2013/0169	Affordable housing commuted sum	48,474.58
SL/2016/1109	Affordable housing commuted sum	151,559.00
SL/2012/0566 and SL/2015/0085	Commuted Sum for Open Space Maintenance at 'The Oaks', housing development, Kendal	3,500.00
SL/2010/1015	Commuted sum for Open Space Maintenance at The Kendal Auction Mart housing development, Kendal	9,499.63
SL/2007/1354	Landscape maintenance relating to housing development at NE Sandylands Road, Kendal	32,400.00



Planning Application	Item	Amount (£)
SL/2003/2098, SL/2003/1755 and SL/2003/1089	Maintenance of on-site open space/play space relating to Pear Tree Park housing development, Holme	10,861.00
SL/2019/0880	Open Space / play area at Lightburn Park play area, Ulverston (relates to West End Nurseries housing development, Ulverston)	6,487.78
SL/2016/1109	Off-site play area at Lund Farm, Ulverston (relates to Sir John Barrow's Way, Lund Farm housing development, Ulverston)	33,079.87
SL/2014/0506	Open space improvements in the vicinity of the area (to be spent on Brockbeck play area, Kendal, relates to Vicarage Drive, housing development, Kendal)	910.81
SL/2013/0181	Improve play facilities within the vicinity of the site (relates to Gallowbarrow Mill housing development, Natland Road, Kendal)	5,800.00
SL/2015/0085	Off-site play area either Whinlatter Drive Park and / or Hayclose Road Park and play space within the vicinity of the site (relates to Strawberry Fields housing development, Oxenholme Road, Kendal)	5,185.04



Planning Application	Item	Amount (£)
SL/2010/1094	Off-site play space improvements, Levens (relates to Greengate House housing development, Levens)	1,500.00
SL/2014/0835	Off-site play area, Cartmel (relates to Pitt Farm housing development, Cartmel)	3,360.00
SL/2016/0504	Off-site play area, Burton-in-Kendal (relates to Church Bank Gardens housing development, Burton-in-Kendal)	8,484.14
SL/2014/1036	Open Space – Play space improvements in the locality (relates to Thornfield Road, housing development, Grange-over-Sands)	12,305.13
SL/2020/0783	Towards off-site compensation for loss of biodiversity (relates to Brigsteer Road housing development, Kendal). Monies to be transferred to Cumbria Wildlife Trust.	20,800.00
SL/2013/1120	Towards a public realm and junction improvement scheme at the entrance to and along Stramongate off Blackhall Road, Kendal. Includes a ramped shared area access and street scaping with new tree planting.	216,740.13
SL/2019/0146	Bin installation (relating to McDonalds development at Oubas Hill, Ulverston)	3,164.71



Planning Application	Item	Amount (£)
SL/2019/0758	Footbridge linking the site to public car park (relates to Age Concern, Station Square, Grange-over-Sands)	20,000.00
SL/2020/0783	Public right of way improvements and upgrading of surface footpath (relates to Brigsteer Road, housing development, Kendal)	11,000.00
TOTAL		661,292.35

## Non-monetary contributions

### Education

- 2.2.8 No new non-monetary contributions for education were signed in 2022/23. Monies were received in the reporting year 2022-23 by Cumbria County Council for school places at St Patrick's School in Endmoor. These monies relate to the North of Sycamore Drive housing development in Endmoor (planning application SL/2017/0841).

### Affordable Housing Delivery – On-site delivery 2022-23

- 2.2.9 The table below indicates the number of affordable homes including type delivered on-site through S106 obligations in 2022/23.

Planning Application	Affordable Homes delivered
SL/2016/0519 Land to the South of Lumley Road, Kendal	<ul style="list-style-type: none"> <li>• 4 discounted sale units</li> <li>• 4 affordable rent units</li> </ul>
SL/2016/0602 Gascow Farm, Ulverston	<ul style="list-style-type: none"> <li>• 3 discounted sale units</li> <li>• 9 affordable rent units</li> </ul>
SL/2016/1109 Sir John Barrow Way, Ulverston	<ul style="list-style-type: none"> <li>• 6 affordable rent units</li> </ul>
SL/2017/0620 Land South of Fell Close, Oxenholme	<ul style="list-style-type: none"> <li>• 14 shared ownership units</li> <li>• 11 affordable rent units</li> </ul>
SL/2017/0841 Land north of Sycamore Close, Endmoor	<ul style="list-style-type: none"> <li>• 9 affordable rent units</li> <li>• 4 discounted sale units</li> </ul>
SL/2019/0359 Land to the North of Boon Town, Burton-in-Kendal	<ul style="list-style-type: none"> <li>• 19 affordable rent units</li> <li>• 9 shared ownership units</li> </ul>
SL/2019/0602 Land North of Laurel Gardens, Kendal	<ul style="list-style-type: none"> <li>• 2 discounted sale units</li> </ul>



Planning Application	Affordable Homes delivered
SL/2019/0880 West End Nurseries, Ulverston	<ul style="list-style-type: none"> <li>• 12 shared ownership units</li> <li>• 2 affordable rent units</li> </ul>
SL/2020/0410 Land adjacent to Underbarrow Road, Kendal	<ul style="list-style-type: none"> <li>• 5 shared ownership units</li> </ul>

## Affordable Housing – Planning Obligations entered into 2022/23

2.2.10 Two planning permissions were granted in 2022/23 with planning obligations attached to them for the delivery of 14 affordable housing units in total on site as identified below:

- SL/2021/0358 Land West of Sedgwick Road, Natland – 5 affordable rent units, 2 shared ownership and 3 discounted sale (10 in total)
- SL/2018/0959 Land off Kendal Parks Road, Kendal – 2 affordable rent units, 2 shared ownership units (4 in total)

## 2.3 Community Infrastructure Levy (CIL)

### Introduction

2.3.1 CIL was introduced in 2010 and has been charged in South Lakeland since June 2015. CIL is a set charge, based on the gross internal area floorspace of buildings, on new residential and supermarket development to help fund the infrastructure needed to address the cumulative impact of planned development in the South Lakeland Local Plan. The CIL charging schedule, setting out CIL charging rates, is available on the South Lakeland Local Plan [website](#)<sup>1</sup>. The current rate from 1 January 2023 is £69.34/m<sup>2</sup> for residential development and £208.01/m<sup>2</sup> for supermarkets and retail warehouses.

2.3.2 Local Planning authorities must use CIL to fund ‘the provision, improvement, replacement, operation or maintenance of infrastructure to support the development of the area’. There is also a neighbourhood portion of CIL - ‘Local CIL’ - which is similarly available to fund infrastructure but can also fund ‘*anything else that is concerned with addressing the demands that development places on an area*’. Under ‘Local CIL’, a CIL charging authority must pass 15% of local CIL receipts to the Parish or Town council for the area where a CIL-liable development takes place, rising to 25% if the parish has a Neighbourhood Plan in place. The Heversham and Hincaster Neighbourhood Plan was adopted in February 2017 and the Grange over Sands Neighbourhood Plan was adopted in July 2018. The Allithwaite and Carmel Neighbourhood Plan was examined in Spring/Summer 2023. In unparished areas,

<sup>1</sup> <https://www.southlakeland.gov.uk/planning-and-building/planning/community-infrastructure-levy-cil-for-planning-applications/community-infrastructure-levy-cil-charges-exemptions-penalties-and-appeals/>  
(Copy and paste link into browser to open)



Westmorland and Furness Council as the CIL charging authority can spend equivalent amounts in the locality, following engagement with local communities. While all of South Lakeland is parished, these arrangements for unparished areas apply in those parishes which have Parish Meetings rather than Town or Parish Councils. Parish Meetings are not able to receive and spend ‘Local CIL’. A CIL Advice Note for Parish and Town Councils on CIL is available on the South Lakeland Local Plan [website](#)<sup>2</sup>.

- 2.3.3 CIL continues to be levied and available to assist with the infrastructure costs of planned development in the area covered by the South Lakeland Local Plan. It should be noted that the Levelling Up and Regeneration Act includes proposals that the current CIL be replaced with a wider Infrastructure Levy, which would also replace most S106 agreements.

#### **Demand notices invoiced and received**

- 2.3.4 There is a CIL instalments policy, which is set out on the South Lakeland Local Plan [website](#)<sup>3</sup>. This allows for CIL to be paid in up to 8 instalments over several years, depending on the size of the housing sites.
- 2.3.5 The CIL Demand Notice however, sets out the whole sum payable and the instalments required; therefore CIL Demand Notices issued during a particular year do not necessarily equate to the CIL sums likely to be received during that year, and can take several years to be paid. In addition, developments can be altered through further planning permissions over time, often resulting in revised Demand Notices needing to be issued. Any such re-issued Notices are not double counted in this report; if a Demand Notice is issued and then re-issued in the same reporting year, only the re-issued Notice would be included within the figure for CIL invoiced during the year.

#### **Headline Figures**

Item	Amount (£)
<b>CIL invoiced</b> (as set out in Demand Notices) <sup>4</sup> in 2022/23	357,284.91
<b>CIL receipts</b> <sup>5</sup> received in 2022/23	1,465,753.66

<sup>2</sup> [https://www.southlakeland.gov.uk/media/8472/parish-and-town-council-advice-note-v5\\_update\\_oct-2023-finaldocx-1.pdf](https://www.southlakeland.gov.uk/media/8472/parish-and-town-council-advice-note-v5_update_oct-2023-finaldocx-1.pdf)

<sup>3</sup> <https://www.southlakeland.gov.uk/planning-and-building/planning/community-infrastructure-levy-cil-for-planning-applications/community-infrastructure-levy-cil-policies-in-south-lakeland/>  
(Copy and paste links into browser to open)

<sup>4</sup> Includes late payment or other surcharges, and interest, included in Demand Notices

<sup>5</sup> Total CIL receipts during reported year which includes any land and infrastructure “payments” received as “In-Kind” CIL payments; any CIL receipts subsequently set aside for CIL administration and ‘Local CIL’ purposes; any CIL surcharges/interest received, and CIL received for any other reason.





Item	Amount (£)
CIL receipts that CIL regs 59E and 59F apply to <sup>6</sup> (funds recovered from Parish or Town Councils or received and retained for Parish Meetings in 2022/23.)	-
<b>CIL expenditure</b> <sup>7</sup> in 2022/23 (as passed to Parish and Town Councils, (£218,505.89); and CIL Admin, (£73,287.68))	291,793.57
<b>CIL retained</b> <sup>8</sup> at end of 2022/23 (from all CIL income prior to April 2023 - as retained for Strategic CIL, £4,349,618.39; CIL Admin, £271,364.81; and areas with Parish Meetings - £720 for Mansergh Parish)	4,621,703.10

2.3.6 In 2022/23 no CIL was spent repaying money borrowed for strategic infrastructure projects. £73,287.68 was retained for **CIL administration**, representing 5% of the total CIL received in 2022/23.

### Parish and Town Councils – Neighbourhood CIL

2.3.7 South Lakeland District Council passed a proportion of CIL (Neighbourhood or Local CIL) to Parish and Town Councils under CIL regulations 59A and 59B in 2022/23, as set out in the following table:

Parish/Town Councils	CIL Paid (£)
Arnside	759.29
Aldingham	2,416.95
Allithwaite and Cartmel	3,464.77
Burton	1,737.51
Duddon	3,473.73

<sup>6</sup> The total amount of CIL that was relevant to CIL regulation 59E (CIL previously paid to a Parish or Town council under CIL Regulation 59A or 59B which has subsequently been recovered from that Parish or Town Council) and CIL regulation 59F (a proportion of CIL set aside to be spent in parishes with Parish Meetings which are unable to receive or spend CIL).

<sup>7</sup> Actual CIL expenditure during the reported year, regardless of when received, including 'Local CIL' allocations both where spent by the charging authority under CIL regulation 59E and 59F, and where passed to parish/town councils under regulation 59A or 59B, whether subsequently spent or not by that council. Also includes CIL passed to external organisations under regulation 59(4) whether subsequently spent or not; CIL spent on administration of CIL; CIL "expenditure" in regard to any land and infrastructure payment received as "In-Kind" CIL payments from the point any development on the land is commenced or completed, and CIL refunded due to overpayments.

<sup>8</sup> Total CIL retained, whenever received and including CIL retained to which regulation 59E and 59F applied.



Parish/Town Councils	CIL Paid (£)
Hutton Roof	1,517.37
Heversham	1,072.06
Kendal	104,008.82
Kirkby Ireleth	10,966.03
Kirkby Lonsdale	6,134.49
Milnthorpe	10,032.26
Natland	2,391.15
Old Hutton and Holmescales	336.54
Preston Patrick	114.14
Preston Richard	18,511.38
Ulverston	45,913.37
Urswick	5,656.03
<b>TOTAL</b>	<b>218,505.89</b>

2.3.8 In 2022/23 CIL passed to external organisations (other than parish/town councils) under CIL regulation 59(4): In January 2023, £75,000 was paid to Cumbria County Council as a contribution towards the cost of the new Gooseholme Bridge over the river Kent in Kendal. The previous footbridge was damaged beyond repair in Storm Desmond.

2.3.9 In 2022/23 under Regulation 59E<sup>9</sup>, SLDC did not recover any CIL previously paid to a parish or town council. In the same year, under Regulation 59F, SLDC set aside no additional funds to be spent in areas with Parish Meetings (which are unable to receive or spend CIL).

#### **CIL Receipts retained (allocated<sup>10</sup> and unallocated)**

2.3.10 No CIL receipts, received prior to 2022/23, had been allocated (to an infrastructure project or item), but not spent, by the end of 2022/23.

2.3.11 The total amount of CIL receipts, received prior to 2022/23, which had not been allocated (to an infrastructure project or item), by the end of 2022/23: £3,100,658.30, after taking account of £75,000 allocated to the Gooseholme Bridge, Kendal in September 2021.

<sup>9</sup> Reporting authorities should be clear in this section when infrastructure provision (or provision of “anything else that is concerned with addressing the demands that development places on an area”) was undertaken in respect of regulation 59E and 59F. Parish/Town councils are separately required to report on CIL sums received through regulation 59A and 59B.

<sup>10</sup> ‘Allocated’ means CIL sums retained by the reporting authority which have, or knowingly will be, passed to an internal team to fund a specific infrastructure project or infrastructure type. ‘Allocated’ also includes sums which will knowingly be passed to an external organisation but which are yet to be passed.



2.3.12 The total amount of CIL receipts, whenever collected including 2022/23 which were allocated (whether allocated prior to or during 2022/23) but not spent during 2022/23. £380,000:

- £80,000 was allocated towards a scheme to improve a section of the Lancaster Canal Towpath Trail from Crooklands to Stainton.
- a contribution in principle of £300,000 from CIL towards major repairs and improvements to the Grange Lido and Promenade.

#### **CIL Receipts retained (regulation 59E and 59F)**

2.3.13 No notices were served in accordance with regulation 59E<sup>11</sup> (to recover CIL previously passed to a parish or town council).

2.3.14 CIL receipts received in 2022/23 retained at the end of 2022/23 (other than those to which CIL regulation 59E and 59F applied): £1,247,247.68, including strategic CIL and CIL Admin.

2.3.15 CIL receipts received before 2022/23 retained at the end of 2022/23 (other than those to which CIL regulation 59E and 59F applied): £3,298,735.40 (strategic CIL and CIL admin).

2.3.16 No CIL receipts received were retained at the end of 2022/23 to which CIL regulation 59E or 59F applied.

2.3.17 CIL receipts received prior to 2022/23 to which CIL regulation 59E or 59F applied, retained at the end of 2022/23: £720.00 ('neighbourhood' CIL relating to Mansergh Parish).

#### **CIL Infrastructure Expenditure<sup>12</sup> in 2022/23**

2.3.18 During 2022/23, £75,000 of CIL was spent on strategic infrastructure in the form of a contribution to Cumbria County Council towards the cost of Gooseholme Bridge in Kendal. This new pedestrian and cycle bridge over the river Kent replaced a footbridge which was damaged during Storm Desmond.

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<sup>11</sup> Reporting authorities are not necessarily required to name any parish/town council to which this regulation applies.

<sup>12</sup> 'Infrastructure expenditure' mainly relates to CIL spent by the reporting authority but this section can include details of infrastructure provision undertaken by an external organisation who has been passed CIL funds by the reporting authority under regulation 59(4). The reporting authority should clearly specify in this section any infrastructure provision relevant to regulation 59(4).





Figure 3: Gooseholme Bridge, Kendal

2.3.19 Significant elements of strategic infrastructure essential for the delivery of planned growth in the South Lakeland Local Plan were funded and delivered from a variety of other sources in earlier years. Examples include:

- £3.4m for highways and transport improvements in Kendal, including road junction improvements and improved cycle routes, funded by Cumbria Local Enterprise partnership (LEP);
- £4.5m for improvements to the A590 in Ulverston funded by the Cumbria LEP, including a new road access to the Local Plan employment allocation at Lightburn Road, part of which has been developed for a 'Blue Light' hub.

2.3.20 In September 2022 work was completed on the £10.5m roundabout on the A590 at Swarthmoor to serve sites allocated in the Local Plan for about 1200 homes in Swarthmoor and south Ulverston. Sources of funding for the project include Highways England, Cumbria LEP, developer contributions and South Lakeland District Council (SLDC). No CIL funding was required.

2.3.21 In year 2022/23, South Lakeland District Council committed £80,000 towards a £300,000 improvement scheme to improve the Lancaster Canal Towpath Trail between Crooklands and Stainton. It also indicated a contribution in principle of £300,000 from CIL towards major repairs and improvements to the Grange Lido and Promenade.

2.3.22 In 2022/23, discussions continued with the health sector about the need for additional primary care capacity arising from planned housing growth provided for in the Local Plan, for which CIL could assist. For Kendal and Ulverston, CIL also remains available to help fund expansion of Primary Schools, when the need arises. Elsewhere the need for additional school capacity is met through S106 contributions.

2.3.23 SLDC was superseded by the new unitary Westmorland and Furness Council from 1 April 2023. However, CIL will continue to be levied and available to assist with the infrastructure costs of planned development in the area covered by the South Lakeland Local Plan.

### **CIL Infrastructure List**

2.3.24 Regulation 121A(1)(a) requires the infrastructure funding statement to include:

*“a statement of the infrastructure projects or types of infrastructure which the charging authority intends will be, or may be, wholly or partly funded by CIL (other than CIL to which regulation 59E or 59F applies) (“the infrastructure list”)”*

2.3.25 The District Council published priorities for spending CIL in the [Infrastructure delivery Plan](#)<sup>13</sup> (IDP), and its [Executive Summary](#)<sup>14</sup> (August 2017) for the types of infrastructure required to support the delivery of the current [South Lakeland Local Plan](#)<sup>15</sup> (2003-2025). The Council is reviewing its Local Plan documents and will reflect the changing infrastructure needs arising from the review in future revisions to the Infrastructure Delivery Plan and this Infrastructure Funding Statement.

2.3.26 The types of infrastructure projects that CIL should be wholly or partly spent on are listed below, based on evidence underpinning the published Infrastructure Delivery Plan, ongoing dialogue with service providers including for example the NHS and current priorities. This list replaces the CIL Regulation 123 Lists under the CIL Amendment England Regulations 2019 that came into effect 1 September 2019.

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<sup>13</sup> <https://www.southlakeland.gov.uk/media/4287/infrastructure-delivery-plan-august-2017.pdf>

<sup>14</sup> <https://www.southlakeland.gov.uk/media/4288/idp-executive-summary-august-2017.pdf>

<sup>15</sup> <https://www.southlakeland.gov.uk/planning-and-building/local-plan/south-lakeland-local-plan/>

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### **Projects which are critical or essential to support the delivery of the South Lakeland Local Plan:**

- Transport and Air Quality Improvement Measures in Kendal Town Centre and surrounding area to support new development.
- A590 Ulverston Access Improvements to support delivery of housing and employment development sites, including Swarthmoor Roundabout
- Access to employment sites including Scroggs Wood, Kendal; East of Burton Road, Kendal; the Mainline site, Milnthorpe; Land North of Meadowbank Business Park, Kendal; and the mixed-use regeneration and employment opportunity sites at Ulverston Canal Head
- School place provision where needed to accommodate development at Kendal and Ulverston's Primary and Secondary Schools, and Cartmel Priory Secondary School

### **Schemes which are important but not considered critical or essential to the delivery of the South Lakeland Local Plan:**

- Highway and Transport Schemes including sustainable transport with strategic benefits not directly related to development, including those arising from the Kendal Town Centre Strategy and Kendal Local Cycling and Walking Plan and emerging local cycling and walking plan for Ulverston.
- Community Facilities Improvements not directly related to a development.
- Strategic green infrastructure not directly related to a development such as the Lancaster Canal Multi-functional trail.
- Cultural and leisure facilities which are not directly related to a development.
- Open Space Improvements to strategic publicly accessible areas at Lightburn Park Ulverston; Abbot Hall Park, Kendal Castle Hill and Nobles Rest in Kendal; and the Promenade, Park Road Gardens and Ornamental Gardens Grange-over-Sands.
- Kendal and Ulverston Canal Head area regeneration, public realm, heritage and environment projects across district not directly related to a development.
- Health Care facilities.
- Kendal Parkside Cemetery extension, Arnside Cemetery additional space, Grange Fell cemetery and Ulverston cemetery.
- Sustainable transport improvements in Ulverston.
- Infrastructure that may support the regeneration/redevelopment of existing employment sites and other sites that would support the strategic objectives of the Local Plan.



## 3. Barrow Borough

### 3.1 Relevant Local Plan Policies, planning policy guidance, evidence base and studies

3.1.1 Policy I1 of the Barrow Borough Local Plan 2016-2031 sets out the type of contributions a developer may be expected to make to assist in mitigating the effect of the proposed development in the existing community. The policy states that the types of infrastructure that developments may be required to provide contributions towards include, but are not limited to:

- Utilities and waste;
- Flood prevention and sustainable drainage measures;
- Transport (highway, rail, bus and cycle / footpath network and any associated facilities);
- Community Infrastructure including health, education, libraries, public realm, heritage and geological assets and other community facilities;
- Green Infrastructure (such as outdoor sports facilities, open space, parks, allotments, play areas, enhancing and conserving biodiversity and management of environmentally sensitive areas); and
- Climate change and energy initiatives through allowable solutions.

3.1.2 The requirement for affordable housing delivery is set out in Policy H14 of the Local Plan. In line with the National Planning Policy Framework (NPPF), this policy expects that 10% of dwellings on sites of ten units or over should be affordable. Alternatively, contributions to the provision of affordable housing off-site will be considered where justified. The requirement for affordable housing was first introduced in the former Borough in 2018, when the requirement was included in the updated NPPF. It was subsequently included in Policy H14 of the Barrow Local Plan, which was adopted in 2019. It is therefore a relatively recent requirement in the Barrow area.

3.1.3 The Affordable Housing and Developer Contributions Supplementary Planning Document was adopted in July 2022. This sets out the former Barrow Borough Council's approach to the delivery of affordable housing and the approach to seeking financial contributions from developers for a variety of infrastructure and services.

3.1.4 The Infrastructure Delivery Plan (IDP) establishes what additional infrastructure and service needs are required to support the level of development proposed in the Barrow Borough Local Plan. This has been produced through engagement with infrastructure and service providers, including the Local Highway Authority and the Local Education Authority. The IDP helps to ensure that the additional infrastructure and services that are needed to support development are identified and delivered in



a timely, co-ordinated and sustainable way. It is a mechanism for improving delivery of facilities and services for the benefit of local communities and will provide a robust framework that will support bids for funding and assist decision making.

- 3.1.5 The IDP is supported by the Barrow Transport Improvement Study 2016 (Stages 1 and 2 Assessments). This sets out traffic modelling results and recommends a number of improvements at junctions in the Borough, including designs and costs. In 2020, a Stage 3 Assessment was produced which prioritises schemes and provides detailed designs and updated costs. The IDP will be updated to take account of the Stage 3 Study.
- 3.1.6 The Barrow Transport Improvement Study 2016 (Stages 1 and 2 Assessments) also sets out recommendations for walking, cycling and public transport infrastructure / service improvements to support the Local Plan. More recently, a Local Cycling and Walking Infrastructure Plan (LCWIP) has been prepared by the former Cumbria County Council, in partnership with the former Barrow Borough Council, and this includes a Cycling Priority Network with infrastructure improvements taking place over several phases.

## 3.2 Section 106 Agreements

### **Obligations that have been entered (agreed) into in 2022-23**

- 3.2.1 B07/2021/0771 Outline Planning Application for a mixed-use development comprising builders' merchant; and residential development of up to 48 dwellings at Land South of County Coachbuilders, Park Road, Ormsgill. Full planning permission has since been granted for the builders' merchant and this development has been completed. The residential permission remains as an Outline permission. The Section 106 agreement with the Outline planning application requires:
- Highways improvement of the Park Road / Bank Lane junction at Ormsgill, Barrow. This scheme is identified in the Barrow Transport Improvement Study 2016 (Scheme 1180).
  - 10% of affordable housing on site. The agreement states: "At any time, not later than three years after the Commencement of Development of the residential element of the Development detailed in the Outline Planning Permission, the Owner shall notify the Council in writing of the commencement of the Offer Period. On commencement of the Offer Period, the Owner shall offer to transfer the Agency Land and the Affordable Housing to an Agency or Agencies."
- 3.2.2 B13/2021/0646 Outline Planning Application for the development of up to eight dwellings at Duke Street, Askam. The Section 106 agreement requires contributions towards a cycle improvement scheme from Askam to Dalton and associated traffic calming measures including a scheme to move the 30mph speed limit and introduce





traffic calming measures to Lots Road, Askam. The cycle improvement scheme is identified in the Barrow Transport Improvement Study 2016 (scheme 11).

Planning Application	Item	Amount (£)
B07/2021/0771	Highways – Improvement of the Park Road / Bank Lane junction, Barrow	91,743.00
B07/2021/0771	Affordable Housing – 10% affordable housing on site	-
B13/2021/0646	Transport and Travel – Cycleway improvements between Barrow and Dalton	5,800.00
TOTAL		97,543.00

### Money received through planning obligations received in 2022-23

- 3.2.3 B07/2018/050 Full planning application for residential development of 58 dwellings at Arthur Street, Barrow. This was a housing market renewal site in Central Barrow. The Unilateral Undertaking requires contributions for cycleway improvements at Lesh Lane and Harrel Lane in Barrow, as identified in the Barrow Transport Improvement Study (scheme 1). This connects two local routes through residential areas.

Planning Application	Item	Amount (£)
B07/2018/0507	Transport and Travel – Cycleway improvements at Lesh Lane and Harrel Lane, Barrow	7,200.00
TOTAL		7,200.00

### Money spent through planning obligations in 2022-23

- 3.2.4 B07/2016/0902 Full planning application for residential development of 69 dwellings at Sherborne Avenue, Barrow. £106,104.44 was received during the 2020/21 year. This comprised of £41,962.44 for the development of a children’s play area on land identified on the submitted plans as the “pink land”; plus £64,142 for the maintenance of the “pink land” and the new open space on site, identified as the “yellow land”. The children’s play area on the “pink land” was developed and completed during the 2022/23 year. It is expected that the open space on the “yellow land” will be completed during the 2023/24 year. Maintenance will take place indefinitely, and the Ground Maintenance team present the Council’s accountant with a breakdown of the repairs/inspections at the end of each year.





Figure 4: Children's Play Area at Sherborne Avenue, Barrow

Planning Application	Item	Amount (£)
B07/2016/0902	Open Space and Leisure – development of children's play area at Sherborne Avenue	41,962.44
TOTAL		41,962.44

**Monies received through planning obligations received and retained (unspent) as at end of 2022-23**

Planning Application	Item	Amount (£)
B07/2016/0902	Open Space and Leisure – maintenance of children's play area and open space at Sherborne Avenue, Barrow. Received 2020/21.	64,142.00
B07/2018/0507	Transport and Travel – Cycleway improvements at Lesh Lane and Harrel Lane, Barrow. Received / transferred to Cumbria County Council 2022/23.	7,200.00



Planning Application	Item	Amount (£)
TOTAL		71,342.00

### Non-monetary contributions

#### Affordable Housing Delivery – On-site delivery 2022-23

- 3.2.5 B07/2018/0507 Residential development of 58 dwellings at Arthur Street, Barrow. This scheme includes 23 affordable units (starter homes), 20 of which have already been delivered prior to 2022/23. There was one affordable completion on this site during 2022/23.
- 3.2.6 B07/2021/0532 Residential development of 53 dwellings at Lots Road, Askam (North Site). This scheme includes three affordable units (affordable rent), all of which were completed in 2022/23.

Planning Application	Affordable Homes delivered
B07/2018/0507	1
B07/2021/0532	3

### Education

- 3.2.7 No education contributions for school places were agreed, received or spent during 2022/23.



## 4. Eden District excluding the Lake District National Park and the Yorkshire Dales National Park

### 4.1 Relevant Local Plan Policies, evidence base, planning policy guidance and studies

4.1.1 Policy DEV4 of the Eden Local Plan 2014-2032 specifies developer contributions may be sought to fund new infrastructure and, in some cases, they will take the form of a financial contribution. It states in all cases they will be directly, fairly and reasonably related in scale and kind to the proposed development. Infrastructure requirements are set out in the Infrastructure Delivery Plan. The policy defines supporting infrastructure as:

- Essential infrastructure: including adequate highway access and capacity, primary and secondary school placements, clean water supply, adequate wastewater capacity, sustainable drainage systems and energy supply
- Location specific infrastructure: including transport (cycling and walking facilities, public transport, car parking, electric vehicle charging points), education (education provision including further and higher education facilities, nursery schools), health (GP surgeries, hospitals, ambulance services and adult social care), social (fire police and rescue services, high speed internet access, children's play areas and equipment, sports facilities, supported accommodation including extra care housing, open spaces and parks, social and community facilities and allotments), environmental (natural and semi-natural green spaces, landscaping, replacement/new habitat, flood defences and drainage infrastructure), public services (waste management and disposal, libraries, cemeteries and churchyards and police and fire services)

4.1.2 Policy HS1 of the Eden Local Plan states that the Council will seek to secure the provision of 30% of all new housing as affordable homes on schemes with 11 or more units or more than 1,000m<sup>2</sup> of floorspace. Where an on-site contribution does not equate precisely to a whole number of units, the contribution will be rounded down to the nearest unit. Size, type and tenure of affordable housing is negotiated on a site-by-site basis based upon the most up to date evidence of housing need.

4.1.3 In the three Market Towns (Alston, Appleby and Kirkby Stephen), the Key Hubs and the Smaller Villages and Hamlets a commuted sum will be required from sites with 6 to 10 units secured by means of a planning obligation. In Other Rural Areas (outside Key Hubs and Smaller Villages and Hamlets), new housing will be restricted to affordable housing.



- 4.1.4 Where it can be demonstrated that application of the policy will render any housing scheme unviable, fewer affordable homes than required by this policy will be acceptable if a financial appraisal provides evidence to justify any reduced provision.
- 4.1.5 A Housing Supplementary Planning Document was adopted in April 2020. This provides detailed guidance on the interpretation of housing policies within the Eden Local Plan 2014 - 2032. Changes made to the NPPF in February 2019 may impact on decision making and where possible these instances have been set out in the Housing Supplementary Planning Document.
- 4.1.6 The 2017 Infrastructure Delivery Plan (IDP) establishes what additional infrastructure and service needs are required to support the level of development proposed in the Eden Local Plan. This was produced through engagement with infrastructure and service providers, including the Local Highway Authority and the Local Education Authority. The IDP helps to ensure that the additional infrastructure and services that are needed to support development are identified and delivered in a timely, co-ordinated and sustainable way. It is a mechanism for improving delivery of facilities and services for the benefit of local communities and will provide a robust framework that will support bids for funding and assist decision making.
- 4.1.7 The IDP notes how new developments place pressure on existing infrastructure which sometimes results in the need for new or improved facilities and services, so developers can be required to contribute to the costs of such provision. This may involve the developer being required to provide or improve the infrastructure - for example improving a road junction or providing open space on a development, or it may involve the developer providing a sum of the money to the local authority to provide the infrastructure, for example a financial contribution towards the cost of providing extra school places. These contributions towards infrastructure are known as 'developer contributions' or 'planning obligations' and are currently agreed between developers and local authorities as part of the planning application process, and are then set out in a S106 legal agreement.
- 4.1.8 The Penrith Parking and Movement Study (PPMS) was jointly commissioned by Cumbria County Council (CCC), Eden District Council (EDC) and Penrith Town Council (PTC) in 2019. The overarching aim of the study was to understand how existing parking provision in Penrith could be enhanced, whilst maximising connectivity between car parks, for cyclists and walkers within the town centre, key employment areas and the bus and railway station.
- 4.1.9 The PPMS presented the justification for a comprehensive package of interventions to improve parking and movement within Penrith. A total of 39 interventions were shortlisted, and 34 were recommended as part of the PPMS. These interventions were grouped into eight thematic packages, and a prioritised and costed list of interventions. In July 2022, the Local Cycling and Walking Infrastructure Plan (LCWIP) Technical Report for Penrith was released, which



built on the work undertaken as part of the PPMS and provided a more coherent plan for active mode infrastructure in the town.

## 4.2 Section 106 Agreements

### Obligations that have been entered (agreed) into in 2022-23

- 4.2.1 As a result of Nutrient Neutrality restrictions, there were no major approvals during the year and consequently no new Section 106 agreements in Eden.

### Money received through planning obligations received in 2022-23

- 4.2.2 The Council received an additional £34,430 in 2022/2023 from outstanding historical 106 Agreements relating to single dwellings which is to be used towards the Council's Affordable Housing Fund.

Planning Application	Item	Amount (£)
14/0677	3% Of Market Value relating to Pea Top Farm Culgaith	5,850.00
12/0424	3% Of Market Value relating to Barney Scar Soulby	16,850.00
12/0101	3% Of Market Value relating to Martindale Farm Crosby Garrett	10,500.00
13/0084	3% Of Market Value relating to The Linney Appleby-In-Westmorland	1,230.00
TOTAL		34,430.00

\*OMV (Of Market Value) - Percentage of the whole property value at the date of the s106 agreement, clarified by an independent Chartered Surveyor.

### Money spent through planning obligations in 2022-23

- 4.2.3 Although Cabinet/Council approved quite a few applications in 22/23 no money was spent.

### Monies received through planning obligations received and retained (unspent) as at end of 2022-23

- 4.2.4 At the end of March 2023 £1,196,084.16 was held comprising exclusively of monies received through planning obligations to be spent on affordable housing.

Planning Application	Item	Amount (£)
08/0295 16/0056	Affordable Housing Fund relating to Manor Park, Carleton	839,129.30



Planning Application	Item	Amount (£)
10/1010	Affordable Housing Fund relating to Melmerby Hall, Melmerby	30,000.00
11/0161	Affordable Housing Fund relating to The Old Brewery, Alston	4,500.00
11/0576	Affordable Housing Fund relating to Hube View Row End Farm, Warcop	5,334.00
11/0654	Affordable Housing Fund relating to Bark Mill House, Lazonby	7,986.00
11/0740	Affordable Housing Fund relating to Greggs Bakery Friargate, Penrith	128,797.19
12/0085	Affordable Housing Fund relating to Auction Mart Lane, Penrith	1,454.17
12/0101	Affordable Housing Fund relating to The Barn, Martindale	10,500.00
12/0249	Affordable Housing Fund relating to The Bulls Head Inn, Shap	9,250.00
12/0368	Affordable Housing Fund relating to Temperance Hall, Warcop	11,498.50
12/0456	Affordable Housing Fund relating to Joiners Cottage Swan Avenue, Brough	4,440.00
12/0491	Affordable Housing Fund relating to Merridene Station Road, Shap	4,350.00
13/0084	Affordable Housing Fund relating to The Linney, Appleby-In-Westmorland	1,230.00
13/0100	Affordable Housing Fund relating to Pasture Park, Soulby	36,000.00



Planning Application	Item	Amount (£)
13/0213	Affordable Housing Fund relating to Bromley Green Farm, Gt Ormsicle	4,890.00
13/0262	Affordable Housing Fund relating to Bankfoot View, Nenthead	4,060.00
13/0288	Affordable Housing Fund relating to Old Fellows Hall, Brough	2,500.00
13/0298 14/0190	Affordable Housing Fund relating to land adjacent to Hazelbank Gardens, Yanwath	18,975.00
13/0519	Affordable Housing Fund relating to Blacksheep Barn Thwaite Cottage, Penrith	5,700.00
13/0751	Affordable Housing Fund relating to Warcop House, Warcop	3,660.00
13/0962	Affordable Housing Fund relating to Barco Lodge Folly Lane, Penrith	4,500.00
14/0490	Affordable Housing Fund relating to King Street, Penrith	4,770.00
14/0677	Affordable Housing Fund relating to Pea Top Farm Culgaith, Penrith	5,850.00
14/0782	Affordable Housing Fund relating to Westmorland Rise, Appleby-In-Westmorland	8,160.00
14/6170	Affordable Housing Fund relating to Robin Hood View Cottage, Winskill	7,000.00
15/0727	Affordable Housing Fund relating to Phoenix Hall, Skelton	6,450.00
16/0294	Affordable Housing Fund relating to Fellside Nicholson Lane, Penrith	8,250.00





Planning Application	Item	Amount (£)
12/0424	Affordable Housing Fund relating to Barney Scar, Soulby	16,850.00
TOTAL		£1,196,084.16

### Affordable Housing Delivery – On-site delivery 2022-23

4.2.5 In total 83 affordable houses were delivered in 2022-23.

Planning Application	Affordable Homes delivered
16/0811, Penrith	20
17/0527, Hackthorpe	4
19/0426, Penrith	19
20/0199, Kirkby Stephen	9
20/0616, Penrith	24
20/0664, Greystoke	2
20/0995, Penrith	5

### Education

4.2.6 No education contributions for school places were agreed, received or spent during 2022/23. Any contributions previously received and held went to Cumbria County Council.



## 5. Cumbria County Council

### 5.1 Relevant Local Plan Policies, planning policy guidance, evidence base and studies

5.1.1 In 2022-23 Cumbria operated with a two-tier Local Government Structure, with Cumbria County Council existing on the upper tier. Within the newly formed Westmorland and Furness Council this covers the previous Eden District, South Lakeland District, Barrow Borough Councils as well as part of the Lake District National Park and Yorkshire Dales National Park Authorities. Within this IFS the reporting below is focused on the councils and authorities listed below:

Cumbria County Council as an upper tier council held statutory responsibilities for public services for such matters as -

- Highways
- Transport
- Education
- Waste management (e.g., household waste recycling centres and landfill sites)
- Libraries
- Social care
- Minerals and waste (outside of national parks) plus 'Regulation 3' planning applications (i.e., schools, libraries & care homes owned/controlled by the County Council)

5.1.2 S106 contributions were considered in line with the Cumbria County Council's Planning Obligations Policy [Cumbria County Council Planning Obligations Policy](#)<sup>16</sup>

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<sup>16</sup> <https://cumbria.gov.uk/elibrary/Content/Internet/538/755/1599/41590142248.PDF>  
(Copy and paste link into browser to open)



## 5.2 Section 106 Agreements

5.2.1 The statements contained in section 5 relate to the agreements which the previous part of Cumbria County Council within the new Westmorland and Furness Council boundary were party to.

### **Obligations that have been entered (agreed) into in 2022-23 by Cumbria County Council during 2022/23 and agreed contributions per Council or Authority**

5.2.2 There were no obligations entered into in 2022-23 by Cumbria County Council with other Cumbria local planning authorities as indicated in the table below.

Council or Authority	Description	Amount (£)
Eden District Council	No agreements	-
South Lakeland District Council	No agreements	-
Barrow Borough Council	No agreements	-
Lake District National Park Authority	No agreements	-
Yorkshire Dales National Park Authority	No agreements	-
TOTAL		-

### **Money received through planning obligations received in 2022-23**

5.2.3 A total of £1,644,062.47 was received through planning obligations in 2022-23. The table below shows the planning applications the planning obligations relate to.

Planning Application	Item	Amount (£)
03/17/0333	School Transport - relating to The Thorpe, Greystoke. Transport for children who live on the Development to QEGS, Penrith	45,835.36
03/19/0426	Highway Contribution relating to Carleton Road, Penrith. The widening of footways and improvements to toucan crossing and pedestrian island	52,028.61
03/19/0426	Travel Plan Monitoring Contribution relating to Carleton Road, Penrith.	6,600.00
03/19/0426	Primary Education Contribution relating to Carleton Road, Penrith.	663,595.06



Planning Application	Item	Amount (£)
03/19/0426	Corney Place Highway Contribution relating to Carleton Road, Penrith - reconfiguration of the highway at Corney Place.	136,971.52
03/19/0426	Cromwell Road Highway Contribution relating to Carleton Road, Penrith - creation of pedestrian facilities at the A592 roundabouts with Cromwell and B5299 Norfolk Road	31,839.26
03/19/0426	School Transport Contribution relating to Carleton Road, Penrith.	42,032.65
05/14/0846	Highways Improvement Contribution relating to Lumley Road, Kendal - towards improving the junction between Milnthorpe Road and Romney Road, Kendal	45,292.98
05/14/0846	School Improvement Contribution relating to Lumley Road, Kendal - Vicarage Park CoE School.	335,825.22
05/17/0620	Highway Works Contribution relating to Fell Close Off Burton Road, Oxenholme. Pedestrian Refuge in A65 and associated works.	13,683.75
05/17/0841	Education Contribution relating to Sycamore Close, Endmoor - Primary Places at St Patrick's CoE School	167,883.19
05/17/0841	Secondary School Transport Contribution relating to Sycamore Close, Endmoor - for children who live on the Development to the Queen Elizabeth School, Kirkby Lonsdale or such suitable alternative.	88,674.87
05/19/0602	Travel Plan Monitoring Contribution relating to Laurel Gardens, Kendal.	6,600.00
06/18/0507	Cycle Link Contribution relating to Arthur Street Barrow-in-Furness (Sutherland Court). - towards the cycle route ID no. 1	7,200.00
TOTAL		1,644,062.47

### Money spent through planning obligations in 2022-23

5.2.4 The table below shows monies spent through planning obligations in 2022-23.



Planning Application	Item	Amount (£)
03/18/0586	Highway Contribution relating to Station Road, Armathwaite - improve village gateway feature.	6,258.29
05/13/1120	Bus Service Contribution relating to Sainsbury's, Shap Road, Kendal.	980.00
05/19/0398	Travel Plan Monitoring Contribution relating to Underbarrow Road, Kendal	6779.52
06/15/0707	Travel Plan Monitoring Contribution relating to Dalton Lane, Barrow-in-Furness	7,052.76
06/15/0840	Travel Plan Monitoring Contribution relating to The Former Alfred Barrow School, Duke St, Barrow	7,933.20
TOTAL		29,003.77

**Monies received through planning obligations received and retained (unspent) as at end of 2022-23**

5.2.5 The table below shows monies received through planning obligations and unspent as at the end of 2022-23.

Planning Application	Item	Amount (£)
06/18/0089	Junction Improvements Contribution relating to Crompton Drive, Dalton in Furness - junction of Newton Road and Long Lane	8,250.00
06/18/0507	Cycle Link Contribution relating to Arthur Street, Barrow-in-Furness (Sutherland Court). - towards the cycle route ID no. 1	7,200.00
03/08/0291	Education - New Primary school on land at Carleton Heights, Penrith on land to be transferred to County Council or alternative education facilities including improvements or extensions to existing schools	1,979,303.00



Planning Application	Item	Amount (£)
03/08/0291	Traffic Management Contribution - Beacon Edge Traffic Calming £32,337 (H18) Carleton Hill Road T/M £13,885 (H22)	46,222.00
03/15/0799	Education Contribution relating to Carleton Heights, Penrith - Primary School Places	426,275.19
03/19/0222	Education-Secondary relating to Langwathby Hall Farm - School Infrastructure Contribution	49,252.32
03/19/0222	Education Transport Contribution relating to Langwathby Hall Farm.	38,114.00
03/15/0728	Education Contribution relating to Eden Grove, Bolton	38,976.55
03/15/0728	Highway Contribution - footpath improvements relating to Eden Grove, Bolton	19,095.31
03/17/0333	Public Transport Contribution for a Bus Service relating to The Thorpe, Greystoke	38,747.35
03/17/0333	Secondary School Transport Contribution relating to The Thorpe, Greystoke	45,335.63
03/19/0426	Carleton Road Highway Contribution relating to Carleton Road, Penrith	52,028.61
03/19/0426	Travel Plan Monitoring relating to Carleton Road, Penrith	6,600.00
03/19/0426	Education-Primary relating to Carleton Road, Penrith	663,595.06
03/19/0426	Corney Place Highway Contribution relating to Carleton Road, Penrith - reconfiguration of the highway at Corney Place.	136,971.52
03/19/0426	Cromwell Road Highway Contribution relating to Carleton Road, Penrith	31,839.26
05/13/1120	Bus Service Contribution relating to Sainsbury's, Shap Road, Kendal	157,638.00
05/13/1120	Travel Plan Contribution (Bond) relating to Sainsbury's, Shap Road, Kendal	104,832.00
05/13/1120	Travel Plan Admin Fee relating to Sainsbury's, Shap Road, Kendal	4,592.52



Planning Application	Item	Amount (£)
05/17/0841	Education Contribution relating to Sycamore Close, Endmoor - Primary Places at St Patrick's CoE School	314,543.08
05/17/0841	Secondary School Contribution Transport relating to Sycamore Close, Endmoor	88,674.87
05/14/0846	Highways Improvement Contribution relating to Lumley Road, Kendal	45,292.98
05/14/0846	School Improvement Contribution relating to Lumley Road, Kendal	335,825.22
05/14/0846	Travel Plan Monitoring Contribution relating to Lumley Road, Kendal	6,600.00
05/17/0883	Highway Contribution relating to Lakeland Leisure Park, Flookburgh - footway improvements along Moor Lane between Leisure Park and playground	30,000.00
04/14/0822	Education Transport Contribution relating to Greengate Cres, Levens, Kendal	64,629.38
<b>TOTAL</b>		<b>4,740,433.85</b>

