



**Infrastructure  
Funding  
Statement  
2020 - 2021**

**Annual Statement on Developer  
Contributions obtained through the  
Planning System**

**December 2021**

## 1. Introduction

This Infrastructure Funding Statement (IFS) is an annual report which provides a summary of all developer contributions agreed, received, held and spent by Cumbria County Council in the 2020/2021 financial year. Publishing this data is a requirement of the Community Infrastructure Levy (Amendment) (England) (No. 2) Regulations 2019. Infrastructure Funding Statements are intended to improve transparency in respect of developer contributions and help promote improved co-ordination and delivery of infrastructure.

## 2. Two-tier Local Government and LGR

In Cumbria at present, there exists a County Council on the upper tier, covering the whole administrative area. At the lower tier, there are a number of district councils, covering smaller administrative areas. Cumbria also has two national parks (Lake District and Yorkshire Dales) which are local planning authorities, but which also fall within one (or more) districts. For the purposes of this IFS, the reporting is focused on districts although this position will be reviewed for future versions of the document when Cumbria will be replaced by the two new unitary authorities of Cumberland and Westmorland & Furness.

The statutory responsibilities for public services in two tier areas are assigned to one or other of these levels –for instance, county councils are responsible for matters such 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)

Whereas the following are typically dealt with at the lower tier level by the relevant district:

- all other planning applications (unless within national parks which are the 'local planning authority' for determining applications)
- Housing (e.g., ensuring provision of affordable housing and devising housing strategies)
- Waste collection (kerbside)
- Environmental health
- Leisure and recreation.

The County Council works collaboratively with the district/borough Councils and National Park local planning authorities to shape their Local Development Plans and produce Infrastructure Delivery Plans, against which requests for developer contributions are also informed.

### **3. Community Infrastructure Levy**

Developer Contributions can also be secured through the planning system using the Community Infrastructure Levy (CIL) which is a locally set tariff rate based on the floorspace created by certain types of development. Within Cumbria, CIL is currently only established and collected in South Lakeland District Council's planning area (which excludes areas that fall within the national parks).

Within the 2020-2021 financial year the County Council has not received any CIL funding from South Lakeland District Council. When CIL funding is received by the County Council this will be reported in future Infrastructure Funding Statements.

### **4. S.106 Developer Contributions**

A Section 106 agreements uses a formal legal contract between involved parties and contains obligations that relate directly to the development and are fair and reasonable in scale and kind. Obligations may include on-site requirements such as the construction of affordable housing, or financial contributions towards off-site provisions such as education and health

This statement has been structured to provide a concise overview of the key figures we are required to report.

The following definitions are used to reflect the various stages of developer contributions:

#### **Agreed**

Contributions that have been agreed within a signed legal document which have not yet been collected. In the majority of cases this is due to the trigger point within the agreement not being met yet.

#### **Received**

Contributions received, either monetary or non-monetary.

#### **Allocated**

Contributions that have been received and allocated internally to specific projects.

#### **Spent**

Monetary or non-monetary contributions that have been applied to finance expenditure.

## 5. Data Tables

**Table 1: Financial Summary – Agreements entered into during 2020/2021 and agreed contributions per District**

<b>District</b>	<b>Description</b>	<b>Amount Agreed</b>
<b>Allerdale Borough Council</b>	Highway Works	£15,525
	Travel Plan Admin	£6,600
<b>Carlisle City Council</b>	Education-Primary	£14,500
	Education-Secondary	£218,400
	Highway Contribution	£475,000
	Travel Plan Admin	£6,600
<b>Copeland Borough Council</b>	Education-Primary	£224,000
	Highway Contribution	£25,000
<b>Eden District Council</b>	Education-Primary	£141,290
	Highway Contribution	£46,000
<b>South Lakeland District Council</b>	Highway Works	£7,000
	Travel Plan Admin	£6,600
<b>Barrow Borough Council</b>		£0
<b>Total</b>		<b>£1,186,515</b>

**Table 2: Details of Agreements entered into in 2020/2021 (note: there were no new agreements for the Barrow area in 2020/2021)**

**Carlisle City Council**

Agreement No	Signed Date	Site Location	Development Summary	Clause Group	Summary	Amount Due
01/19/0459	09/12/2020	Land at Carleton Clinic, to the west of Cumwhinton Drive, Carlisle	Erection Of Up To 160no. Dwellings With Associated Car Parking, Cycle Parking, Open Space, Landscaping And Associated Infrastructure; All Matters Are Reserved Except For Access (Outline)	Highway	Highway Contribution - Sewell's Lonning Widening Contribution	£155,000
				Highway	Highway Contribution - Carlisle Southern Link Road Contribution	£320,000
				Highway	Travel Plan Admin Monitoring Fee	£6,600
				Education	Education-Secondary	£218,400
<b>Total for 01/19/0459</b>						<b>£700,000</b>
01/19/0953	07/08/20	Greymoorhill, Kingstown Road, Kingstown, Carlisle (Aspen Grange)	Erection Of 75no. Dwellings; Revision of Previously Approved Permission 17/0480 To Increase Units From 68no. To 75no.	Education	Primary Education	£14,500
<b>Total for 01/19/0953</b>						<b>£14,500</b>
<b>Total for Carlisle City Council</b>						<b>£714,500</b>

**Allerdale Borough Council**

Agreement No	Signed Date	Site Location	Development Summary	Clause Group	Summary	Amount Due
02/19/0304	24/12/2020	Land At Stainburn Hall Farm, Stainburn, Workington, Cumbria, CA14 1SZ (Farries Field)	Full planning for the erection of 81 dwellings and associated infrastructure	Highway	Highway Contribution - introduction of a cycleway on Stainburn Road	£15,525

						<b>Total for 02/19/0304</b>	<b>£15,525</b>
02/21/0009	17/02/2021	Land at Lillyhall north, Branthwaite Road Winscales Workington	Hybrid application- Full planning permission is sought for the construction of a new roundabout, site access and spine road and the extension to existing pedestrian/cycle path. Outline permission for the erection of a variety of industrial, storage, research and development and industrial process use buildings (Use classes B2,B8, E(g)ii E(g)iii)	Highway	Travel Plan Monitoring Fee	£6,600	
						<b>Total for 02/21/0009</b>	<b>£6,600</b>
						<b>Total for Allerdale Borough Council</b>	<b>£22,125</b>

#### Eden District Council

Agreement No	Signed Date	Site Location	Development Summary	Clause Group	Summary	Amount Due	
03/19/0920	01/02/21	Land at Old Town (North Side), High Hesket, Carlisle, CA4 0BW	Outline application for residential development - illustrative plan suggests 27 dwellings (N.B. Supersedes 3/15/0841)	Education-Primary	To provide primary school education infrastructure as necessary	£81,290	
				Highway Contribution	footpath link between the Development and the existing footpath.	£46,000	
						<b>Total for 03/19/0920</b>	<b>£127,290</b>
03/20/0616	01/03/21	Land at White Ox Farm, Ingelwood Road, Penrith, CA11 8SE	Erection of 100% affordable housing development comprising of 67 residential dwellings.	Education-Primary	To provide primary school education infrastructure within 4 miles of the site	£60,000	
				Highway Works	Agreement and Provision of Footway Links and Crossing of A6	To provide footway through S278 Agreement	
						<b>Total for 03/20/0616</b>	<b>£60,000</b>
						<b>Total for Eden District Council</b>	<b>£187,290</b>

### South Lakeland District Council

Agreement No	Signed Date	Site Location	Development Summary	Clause Group	Summary	Amount Due
05/19/0359	07/07/20	land to the north of Boon Town, Burton in Kendal, Carnforth, LA6 1LT	Erection of 28 affordable dwellings and associated infrastructure	Highway Works	Public Rights of Way Contribution for the improvement and diversion works in respect of the existing footpath identified as FP 507005	£7,000
<b>Total for 05/19/0359</b>						<b>£7,000</b>
05/19/0398	07/07/20	Land to the south of Underbarrow Road, Kendal	Residential development for 84 dwellings with associated access, landscaping and drainage works	Travel Plan Admin	Travel Plan Monitoring Contribution	£6,600
<b>Total for 05/19/0398</b>						<b>£6,600</b>
<b>Total for South Lakeland District Council</b>						<b>£13,600</b>

### Copeland Borough Council

Agreement No	Signed Date	Site Location	Development Summary	Clause Group	Summary	Amount Due
04/16/2175/001	20/07/20	Land off School Brow Moresby Parks	Outline application for residential development (100 houses)	Education-Primary	for the provision of 20 additional primary school places at Moresby Parks Primary school	£224,000
				Highway Contribution	to be used towards installation of traffic calming measures on School Brow;	£25,000
<b>Total for</b>						<b>£249,000</b>
<b>Total for Copeland Borough Council</b>						<b>£249,000</b>

**Tables 3.1-3.5: Income and Expenditure 2020/2021 by Infrastructure Type per District (note: there were no monetary transactions against Eden District Council agreements in 2020/2021)**

**Table 3.1 Carlisle City Council**

<b>Infrastructure Type</b>	<b>Received</b>	<b>Allocated</b>	<b>Spent</b>
Education Contribution	£116,225	£100,000	
School Transport			
Travel Plan Admin			
Highway Contributions			£11,731
<b>Grand Total</b>	<b>£116,225</b>	<b>£100,000</b>	<b>£11,731</b>

**Table 3.2: Allerdale Borough Council**

<b>Infrastructure Type</b>	<b>Received</b>	<b>Allocated</b>	<b>Spent</b>
Education Contribution			
School Transport			
Travel Plan Admin	£3,145		
Highway Contributions	£15,898		
<b>Grand Total</b>	<b>£19,043</b>		

**Table 3.3: South Lakeland District Council**

<b>Infrastructure Type</b>	<b>Received</b>	<b>Allocated</b>	<b>Spent</b>
Education Contribution			
School Transport			
Travel Plan Admin			
Highway Contributions			£2,361
<b>Grand Total</b>			<b>£2,361</b>



**Table 3.4: Barrow Borough Council**

<b>Infrastructure Type</b>	<b>Received</b>	<b>Allocated</b>	<b>Spent</b>
Education Contribution			
School Transport			
Travel Plan Admin	£7,053		
Highway Contributions			
<b>Total</b>	<b>£7,053</b>		

**Table 3.5: Copeland Borough Council**

<b>Infrastructure Type</b>	<b>Received</b>	<b>Allocated</b>	<b>Spent</b>
Education Contribution			
School Transport			
Travel Plan Admin			
Highway Contributions			£164,000
<b>Total</b>			<b>£164,000</b>