



**Westmorland
& Furness
Council**

Local Plan Project Initiation Document

Local Plan Project Initiation Document

0. Overview

0.1 Project Title:

Westmorland and Furness Council Local Plan

0.2 Version:

V2

0.3 Date:

Published 30 October 2026

0.4 Purpose of this PID document:

This Project Initiation Document (PID) sets out the management framework and approach for delivering the Local Plan. It provides clarity on the plan's scope, governance arrangements, resources, and timelines. The PID is designed as a reference tool for the team, stakeholders, and council leaders, supporting effective decision-making and ensuring everyone involved understands their roles and responsibilities throughout the plan-making process.

The purpose of this PID is to define how Westmorland and Furness Council will go about preparing a new Local Plan.

1. Plan Scope

1.1 Role of Plan:

As a local planning authority (LPA), Westmorland and Furness Council has a statutory duty under both the Planning and Compulsory Purchase Act 2004 and amendments made by the Levelling Up and Regeneration Act 2023 to prepare and adopt a Local Plan. Our Local Plan establishes how land within our area will be used and developed, setting out priorities for housing, employment, infrastructure, design, and the environment.

In planning for housing, the Local Plan must plan for the housing need set out in the government's Standard Method. The Standard Method provides the initial benchmark for determining local housing need.

Importantly, our policies must contribute to climate change mitigation and adaptation, avoid inconsistency and duplication with national development management policies, and align generally with any operative spatial development strategy relevant to our area. The Act empowers the Secretary of State to specify matters our plan must or may address. Once adopted, our Local Plan will serve as the principal basis for making planning decisions, directly shaping the future growth, development, and sustainability of our communities.

1.2 Summary of Plan Scope:

The Westmorland and Furness Local Plan will set out planning policies and propose allocations to meet the needs of the Local Plan area (which excludes the National Parks). It will look ahead until 2045 in order to ensure provision for growth for at least 10 years upon adoption.

The Westmorland and Furness Local Plan will replace all existing local plans in the Westmorland and Furness Council area upon adoption, including the Cumbria Minerals and Waste Local Plan. It will also include policies and any site provision required for Gypsies, Travelers and Travelling Show people.

It is the Council's intention to include minerals and waste policies and site allocations within the Westmorland and Furness Local Plan rather than to produce a separate Minerals and Waste Local Plan. It is proposed to work with Cumberland Council on collation of the evidence base, in particular the Local Aggregates Assessment and the Waste Needs Assessment.

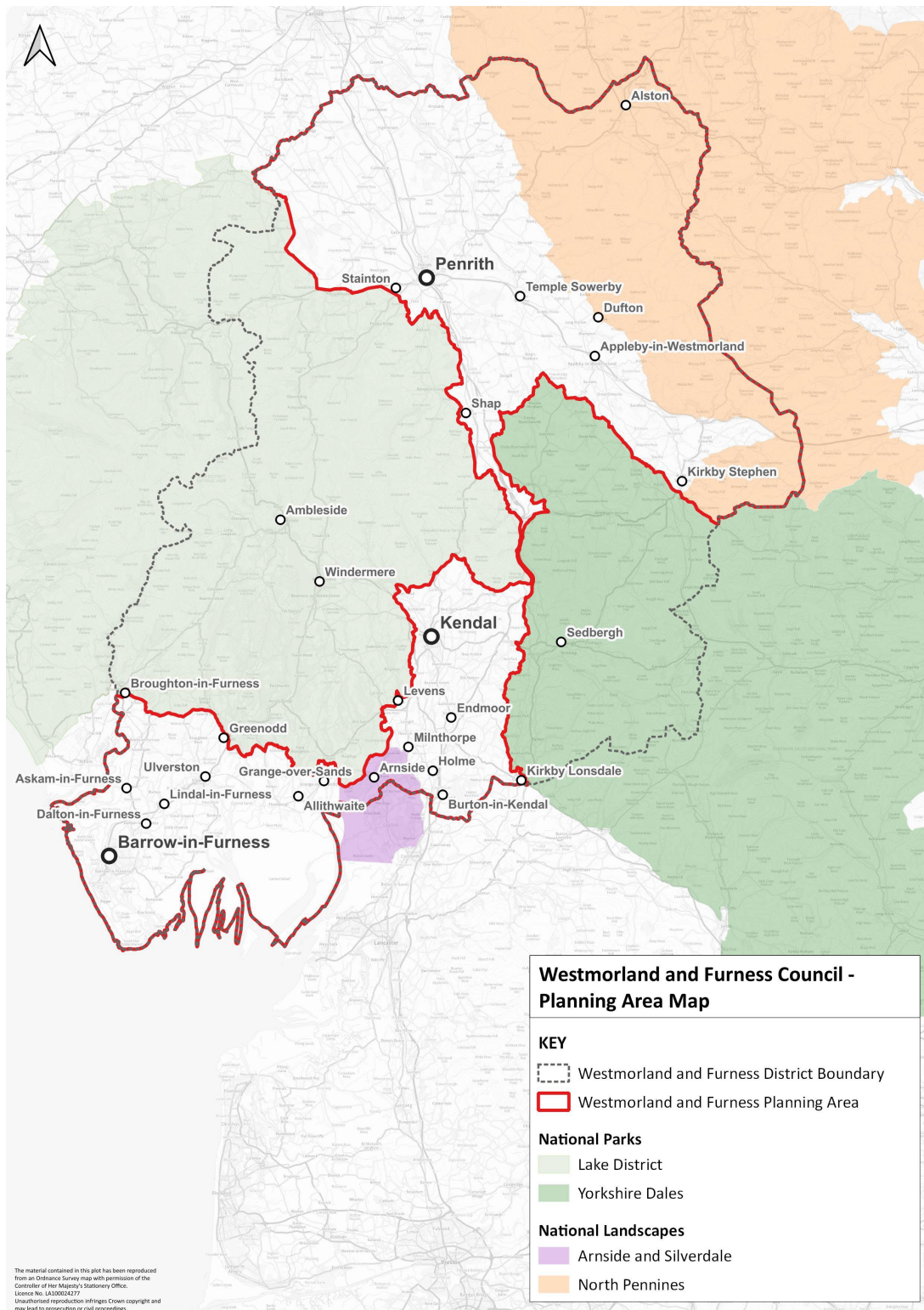


Figure 1: Local Planning Authority Boundary Map

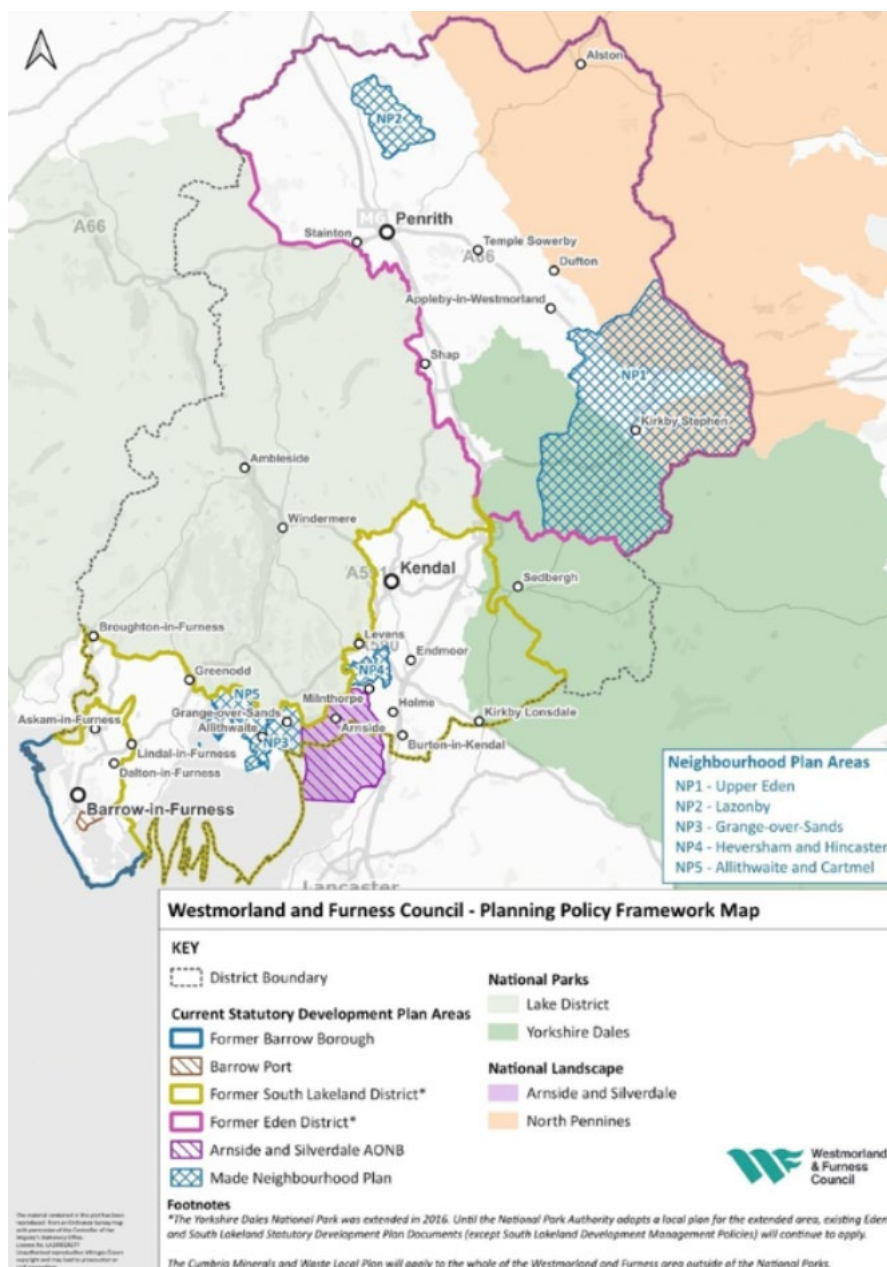


Figure 2: Westmorland and Furness Planning Policy Map

1.3 Relationship to other relevant plans and programmes at the regional or local level:

Westmorland and Furness Council replaced South Lakeland and Eden Districts, Barrow Borough and parts of Cumbria County Council on 1 April 2023. The new Council is responsible for preparing a new development plan, which will replace the legacy Local Plans of the former authorities, which will continue to apply to these areas until they are replaced.

The Westmorland and Furness Consolidated Planning Policy Framework lists the Development Plans and other planning documents and guidance, which will continue to apply in determining planning applications until replaced.

Westmorland and Furness Council has a number of policies, plans and strategies to support decision making and the delivery of our council plan priorities. Full details are available here:

[Policies, plans and strategies | Westmorland and Furness Council](#)

This PID and associated Local Plan timeline replaces all previous versions of Local Development Schemes (LDS) held by the District Councils.

The Lake District and Yorkshire Dales National Park Authorities are responsible for preparing Local Plans for the National Parks, including those parts which fall within Westmorland and Furness district – see Figure 1.

Government planning policy is set out primarily within the [National Planning Policy Framework \(NPPF\)](#), supported by the [Planning Practice Guidance](#) which is regularly updated.

Existing Local Plans

Existing adopted Development Plan Documents (DPDs) will continue to apply to the areas they covered previously until replaced by a new Local Plan.

Existing local plans are:

- Barrow Borough Local Plan 2016-31
- Barrow Port Area Action Plan 2010
- Cumbria Minerals and Waste Plan 2015-2030
- Eden Local Plan 2014-2032
- South Lakeland Core Strategy DPD 2003-2025
- South Lakeland Land Allocations DPD 2013-2025
- South Lakeland Development Management Policies DPD 2019-25
- Arnside and Silverdale AONB DPD 2019-2034 (prepared jointly with Lancaster City Council).

Existing Local Plans can be viewed here: [Legacy Local Plans | Westmorland and Furness Council](#)

2. Plan Timeline

2.1 Plan Stage:

- ☐ Before notice to commence Plan Making
- ☐ Notice to Commence Plan Making
- ☒ Gateway 1
- ☐ Vision and Strategy Development
- ☐ Gateway 2/ Draft Plan Preparation
- ☐ Gateway 3/ Confirm legal compliance
- ☐ Examination to confirm soundness

2.2 Plan Summary Timeline

Stage: Get Ready

Activity	Indicative Start	Indicative End	Regulation
Developing project management process and structure	Aug 2025	Jun 2026	Reg 4
Scoping, collating and procuring early evidence and scoping strategic environmental assessment	Aug 2024	Jun 2026	
Scoping and production of an engagement strategy/ Councillor and key internal and external stakeholder briefings/ early engagement about forthcoming plan production	Sep 2024	May 2026	
Call for sites and initial site assessment process	July 2024	Dec 2026	
Cabinet Workshop – SWOT analysis for Plan vision	1 Jun 2026	1 Jun 2026	
Notice of intention to start plan making (Local Plan and Design Code Supplementary Plan)	Jun 2026	Jun 2026	Reg 19
Integrated Impact Assessment Scoping Consultation	1 Jul 2026	11 Aug 2026	
Scoping Consultation – inviting views on what the plan should contain and how stakeholders should be engaged	1 Jul 2026	11 Aug 2026	Reg 20
Strategic Environmental Assessment as part of an Integrated Impact Assessment	Feb 2026	Oct 2028	

Stage: Prepare Plan

Activity	Indicative Start	Indicative End	Regulation
Gateway 1 (Self-Assessment) Commencement of plan-making	Oct 2026	Oct 2026	Reg 21
Publish Scoping Consultation Summary	Nov 2026	Nov 2026	Reg 22
Prepare Vision and Strategy for consultation, feeding in emerging evidence	Oct 2026	Apr 2027	
Cabinet Briefing – Feedback from Scoping Consultation	Nov 2026	Dec 2026	

Activity	Indicative Start	Indicative End	Regulation
Cabinet Workshop – Proposals for Consultation 2 (proposed content and evidence)	Aug 2027	Sept 2027	
Consultation on proposed content and evidence	6 Sep 2027	18 Oct 2027	Reg 23
Publish consultation summary	18 Oct 2027	15 Nov 2027	Reg 24
Cabinet Briefing – update from Consultation on proposed content	Nov 2027	Dec 2027	
Development of draft plan (and Supplementary Plan) including responding to consultation and any further evidence gathering	Apr 2027	Sept 2027	
Map proposed policies, showing the geographical application of the proposed local plan policies	12 Apr 2027	30 Aug 2027	Reg 25
Cabinet Briefing Update on proposed policies and progress before Gateway2	Mar 2028	Apr 2028	
Gateway 2 (Regulation 26)	May 2028	Jun 2028	Reg 26
Deadline for submission of plan and supporting documents for approval (CMT/DMT in advance of Cabinet) prior to submission		May 2028	
Public consultation on the Design Code Supplementary Plan	12 Jun 2028	7 Aug 2028	SP Reg 70
Public consultation on the proposed Local Plan	12 Jun 2028	7 Aug 2028	Reg 27
Cabinet Briefing Outcome of consultation event	Aug 2028	Sept 2028	
Publication of summary of the consultation	Sep 2028	Sep 2028	Reg 30
Gateway 3 (Regulation 31-33)	Sep 2028	Oct 2028	Reg 31-33

Stage: Submit

Activity	Indicative Start	Indicative End	Regulation
Cabinet approval for submission of plan	Sep 2028	Sep 2028	
Plan Submission	Oct 2028	Oct 2028	Reg 34
Independent Examination (Indicative)	Oct 2028	Apr 2029	Reg 35

Stage: Adopt

Activity	Indicative Start	Indicative End	Regulation
Plan adoption (Indicative)	Apr 2029	Apr 2029	Reg 39

3. Governance and Decision-Making

3.1 Summary of Governance

The Local Plan falls under the Council's Policy Framework defined in the Constitution which can be found on the Council's website: [Council constitution | Westmorland and Furness Council](#)

To ensure the delivery of the Local Plan has sufficient oversight, the Planning Policy team will operate within a formal project and programme management structure.

The **Planning Policy team** will work on collecting the evidence and developing the policies to form the Local Plan. The team is overseen by the Planning Policy Service Manager, supported by the Programme Manager and two Planning Policy Leads.

The **Director of Planning and Regeneration** is the Senior Responsible Officer [SRO] for the Local Plan and is responsible for securing corporate buy-in, making sure the plan making team has the capacity to deliver and leveraging support and resources from the wider organisation. The SRO is Chair of the Local Plan Programme Board. The SRO is responsible for communicating with the Portfolio Holder.

The **Strategic Director of People, Places and Economy** is the Programme Sponsor, responsible for providing strategic direction and strategic alignment with the wider Council.

The **Local Plan Programme Board** meets at least quarterly, and more frequently if required in line with programme milestones. The board has a number of key roles, as defined in the Terms of Reference:

- Act as a forum to provide the Programme Team with guidance and input into the development and delivery of the Programme, acting as a forum for discussion, supportive challenge and senior review, to ensure the Local Plan Programme aligns with the Council Plan and is produced in line with Government legislation.
- Act as a forum to discuss progress in the development and delivery of the Programme against agreed milestones and workplans, supporting the work of the Planning Policy team to ensure development is on track to meet the timescales for Programme delivery.
- Act as a forum for discussion on identified issues related to Programme performance, working with the SRO to identify corrective measures and where appropriate make recommendations to the Programme team.
- Act as an unblocker within their own service areas to ensure a priority focus on Local Plan and timely delivery of actions and outputs.
- Provide input into the operational programme risk register, the purpose of which is to ensure risks to the successful delivery of the Programme are identified and suitable mitigating actions are put in place, making recommendations to the Change and Delivery Group and Programme Assurance Board as appropriate.

The **Local Plan Member Steering Group [LPMSG]** meets on a monthly basis and its primary role is to oversee the preparation of the Local plan and other planning policy documentation. The purpose of the LPMSG is to:

- Advise members about the preparation of the local plan and their responsibilities in relation to it
- provide a means by which information on the progress of the plan and other relevant matters can be cascaded and comments and feedback received from relevant Council committees
- provide a means by which day to day decisions can be taken
- make recommendations to Cabinet on key decisions relating to the plan

The LPMSG is chaired by the Cabinet Member for Planning and Active Well Being. Up until the end of October 2026 membership comprises the Chairs of the Locality Boards, Planning Committees and the Member for Highways, and ICT. Membership will be adjusted from November 2026 in line with changes being made to the structure of planning committees, in line with the Town and Country Planning Regulation Act.

Cabinet briefings and workshops will be held throughout plan-making to ensure Cabinet Members are updated on progress and have input into developing the vision, themes and priorities for the Local Plan.

3.2 Permission to proceed through the Gateways will be defined as follows:

- **Permission to give notice to commence plan-making** (regulation 19); Permission to carry out scoping Consultation (Regulation 20); permission to complete Gateway 1 (regulation 21); permission to publish Gateway 1 assessment (regulation 22): 7 May 2026 Full Council.
- **Gateway 2** – Delegated to Strategic Director of Communities, Place and Economy.
- **Permission to Consult on Draft plan (Regulation 27)** (prior to public consultation in June 2028) Delegated to Strategic Director of Communities, Place and Economy.
- **Permission to Submit** (Regulation 34) – Delegated to Cabinet.
- **Adoption of Local Plan** (Regulation 39) - Full Council.

The Local Plan will be added to the Forward Plan of Key Decisions.

3.3 Council Lead (Portfolio Holder):

Cllr Vicky Hughes, [Cabinet Member for Planning and Active Well Being](#)

3.4 Local Plan Sponsor (Lead Officer) and Senior Officer engagement approach:

Angela Jones, Sponsor | Strategic Director of People, Places and Economy

Gareth Candlin, SRO | Director of Planning and Regeneration, Chair of Programme Board

Helen Houston, Lead Engagement Officer, Planning Policy Service Manager

4. Staff Resource and Management

4.1 Local Plan Manager (Overall Manager of Team and Process):

Name	Job Title	FTE
Helen Houston	Planning Policy Service Manager. Interim Senior Manager, Planning Services (acting up)	1

4.2 Local Plan Team:

Job Level 1 (assistant grade), 2 (planner / senior) 3 Principal/ Sub Team Leader	Post status (filled / vacant)	Job Title	FTE	Estimated % time in a 12-month period on Local Plan
3 Team Leader	Filled	Planning Policy Lead	0.86	90%
3 Team Leader	Filled	Planning Policy Lead	0.75	90%
3 Team Leader	Filled	Technical Services Team Leader	1	90%
3 Principal	Filled	Principal Conservation Officer	1	10%
3 Principal	Filled	Principal Planning Policy Officer	1	90%
3 Principal	Filled	Principal Planning Policy Officer	1	90%
2 Senior	Filled	Senior Planning Policy Officer	0.81	90%
2 Senior	Filled	Senior Conservation Officer	0.75	10%
2 Senior	Filled	Senior Conservation Officer	1	10%
2 Senior	Filled	Senior Planning Policy Officer	1	90%
2 Senior	Filled	Senior Planning Policy Officer	1	90%

Job Level 1 (assistant grade), 2 (planner / senior) 3 Principal/ Sub Team Leader	Post status (filled / vacant)	Job Title	FTE	Estimated % time in a 12-month period on Local Plan
2 Senior	Vacant	Senior Planning Policy Officer	1	90%

Job Level 1 (assistant grade), 2 (planner / senior) 3 Principal/ Sub Team Leader	Post status (filled / vacant)	Job Title	FTE	Estimated % time in a 12-month period on Local Plan
2 Officer	Filled	Planning Policy Officer	1	90%
2 Officer	Filled	Planning Policy Officer	1	90%
2 Officer	Filled	Planning Policy Officer	1	90%
2 Officer	Filled	Planning Policy Officer	1	90%
1 Officer	Filled	Planning Policy Senior Technical Services Officer	1	70%
1 Officer	Filled	Planning Policy Senior Technical Services Officer	1	70%
1 Officer	Filled	Planning Policy Technical Services Officer	0.6	90%
1 Officer	Vacant	Planning Policy Technical Services Officer	0.81	90%
1 Officer	Filled	Planning Policy Technical Services Officer (Fixed Term)	1	90%

4.3 Project Manager:

Job Level	Job Title	Dedicated PM? Y or N – other responsibilities	FTE	Estimated % time in a 12- month period on Local Plan
Team Leader	Programme Manager	Y	0.67	100%
1 Assistant	Filled	Programme Officer	1	100%

4.4 Corporate Support Needs:

What is required	Details	Who will deliver (Teams and Job Titles)
ENGAGEMENT	Attendance at Local Plan Strategy Meeting – 6 weekly throughout plan making period. Joint working with Planning Policy officers to ensure evidence is accurate, timely and informs plan-making.	All officers with a role in plan making or supporting plan making are asked to attend Strategy Meetings
Legal Support	Throughout plan making to support procurement and contract management. At examination, if required, internal support for specific content of the plan.	Legal Team, Lead Lawyer, Planning and Highways Contracts team, on allocation
Procurement Support	Throughout plan making, support and advice on the procurement of consultants to support evidence base work. Support with compensation events and contract variations if the scope of a workstream changes.	Procurement Team Service Manager and Procurement Lead
HR recruitment and retention advice	1 March 2026 – 1 December 2026: Onboarding of new officers as job offers are awarded. Ongoing support throughout plan making via programme board.	HR Team
Finance Support	Throughout plan making. Monthly meeting throughout programme to ensure delivery to budget.	Finance; Service Manager, Case Management Officer
Data and Insights	Throughout plan making. Research and Data Provision and Analysis.	Data Analyst
Technical Support	Technical Services Team Leader to delegate technical support requirements to Technical Services Team. Throughout plan making: Evidence Base Development: support with research and data analysis and visualisation of this (e.g. interactive dashboards) Digital Transformation: facilitate the shift from static PDFs to interactive, map-based, and accessible digital formats for the Local Plan.	Corporate Performance Team, Data and Insight Manager Data and Insights Officer

What is required	Details	Who will deliver (Teams and Job Titles)
Housing Standards & Services Support	<ul style="list-style-type: none"> • Evidence Base Development • Defining Residential Standards • Identifying Specific Group Needs • Providing Expertise on HMOs 	Housing Standards & Services Team, Senior Manager; Strategic Lead
LLFA & Coastal Management Input	<p>Specific advice throughout plan making:</p> <ul style="list-style-type: none"> • Shaping Evidence Base Documents • Developing Policy on Sustainable Drainage (SuDS) • Advising on Site Allocations • Reviewing Strategic Policy • Aligning Local Strategies 	LLFA & Coastal Management
Climate & Natural Environment Input	<p>Specific advice throughout plan making:</p> <ul style="list-style-type: none"> • Evidence Base Development • Policy Formulation for Net Zero & Mitigation • Biodiversity Net Gain (BNG) and Local Nature • Recovery Strategy (LNRS) • Green & Blue Infrastructure Planning • Sustainability Appraisal & Environmental Assessment • Habitats Regulations Assessment (HRA) • Advising on Site Allocations 	Climate & Natural Environment

What is required	Details	Who will deliver (Teams and Job Titles)
Team Barrow Input	Partnership working on the Barrow Growth Strategy up until December 2026.	Team Barrow - relevant masterplanning and transport workstream leads
Development Management Input	Throughout plan making: <ul style="list-style-type: none"> • Reviewing Draft Development Management Policies - 'reality check' • Site Allocation and Viability • Reviewing Past Decisions • Inputting into Sustainability Appraisals • Feedback during Consultations • Aligning with Strategic Priorities • Supporting Evidence Base preparation 	Development Management
Economic Development Input	<ul style="list-style-type: none"> • Evidence Base Development • Site Allocation & Assessment • Strategic Visioning • Stakeholder Engagement 	Economic Development Service Manager
Education	From Gateway 1 <ul style="list-style-type: none"> • Evidence Base Development • Support Infrastructure Delivery Plan work by advising on current education capacity and future needs. • Identifying required developer contributions to deliver new/improved facilities. 	Education

What is required	Details	Who will deliver (Teams and Job Titles)
Housing Strategy and Delivery	<p>From Gateway 1:</p> <p>Evidence Base Development</p> <ul style="list-style-type: none"> • Shaping Policies • Strategic Enabling 	Strategic Lead – Development & Enabling
Leisure, Health & Wellbeing	<ul style="list-style-type: none"> • Providing Evidence and Data • Shaping Land Use Policies • Promoting "Active Design" • Supporting Health Impact Assessment (HIAs) as part of Integrated Impact Assessment (IIA) • Aligning with Strategies 	Leisure, Health & Wellbeing
Public Health advice	<ul style="list-style-type: none"> • Evidence and Data Provision • Supporting Health Impact Assessment (HIA) as part of Integrated Impact Assessment (IIA) • Shaping Healthy Places • Infrastructure Planning • Consultation and Partnership 	Public Health Lead (link with JSNA)

What is required	Details	Who will deliver (Teams and Job Titles)
Transport Strategy (link with Highways)	<ul style="list-style-type: none"> • Evidence Base Development • Sustainable Transport Integration • Strategic Planning Alignment • Impact Mitigation • Policy Support • Stakeholder Engagement • impact identification • identifying infrastructure requirements • Advising on Site Allocations • Active Travel initiatives • Supporting Infrastructure Delivery Plan (IDP) • Developer Contributions (S106/CIL) 	Sustainable Transport and Highways Team Director of Highways, Transport and Infrastructure
Corporate Asset Lead	<ul style="list-style-type: none"> • Identifying Development Sites • Asset Rationalisation • Public Estate Programme • Supporting Sustainability Targets • Providing Financial & Commercial Advice • Regeneration and Place-Shaping 	Estates and Investment Manager Corporate Asset Team

What is required	Details	Who will deliver (Teams and Job Titles)
Environmental Health	<ul style="list-style-type: none"> • Evidence Base Development • Supporting Sustainability Appraisals (SA) & Strategic Environmental Assessments (SEA) • Policy Formulation • Supporting Health Impact Assessments (HIA) • Consultation and Implementation • Advising on Site Allocations 	Environmental Health
Equalities	Supporting Equalities Impact Assessment (EqIA) as part of the Integrated Impact Assessment (IIA)	Corporate Equality, Diversity, and Inclusion Advisor
Culture, Community Infrastructure	<ul style="list-style-type: none"> • Aligning Growth with Services • Infrastructure Delivery Planning • Supporting Infrastructure Delivery Plan (IDP) 	Strategic Lead for Culture, Community Infrastructure

What is required	Details	Who will deliver (Teams and Job Titles)
Parks, Open Spaces and Cemeteries	<ul style="list-style-type: none"> • Developing the Evidence Base • Open Space Audits and Needs Assessments • Asset Management and Condition Surveys • Informing Local Plan Policies • Reviewing Existing Spaces • Setting Provision Standards • Cemetery Strategy • Infrastructure Delivery Planning • Supporting Infrastructure Delivery Plan (IDP) • Developer Contributions (S106/CIL) • Green Infrastructure Strategy 	Parks, Open Spaces and Cemeteries
Historic Environments	Site Assessment and policy development support with regards the Historic Environment Record (HER).	Lead HER Officer
Conservation and Heritage Advice	<ul style="list-style-type: none"> • Policy Formulation • Site Allocations • Public Consultation and Engagement 	Conservation Team

What is required	Details	Who will deliver (Teams and Job Titles)
Comms and Engagement	Throughout plan making <ul style="list-style-type: none"> • Strategy Development • Engagement & Consultation • Branding and Identity • Content Management • Internal Communication • Stakeholder Management • Channel Management 	Comms and Engagement
Arboricultural	From Notice of Intent: <ul style="list-style-type: none"> • Site Assessment support • Policy development support • Data provision on protected trees 	Arboricultural
Adult and Children's Services	From Gateway 1: <ul style="list-style-type: none"> • Evidence Base • Corporate Parenting • Partnership Working • Infrastructure Delivery Plan (IDP) 	Adult and Children's Services

4.5 Identification of any additional skills requirements

- Viability expertise
- Land instability
- Landscape expertise
- Ecology additional resource
- Retail and leisure expertise
- Training for examination hearings, consultation events
- Gypsy and Traveller Needs assessment expertise
- Masterplanning technical expertise

5. Evidence

5.1 Key Evidence

Key Evidence	Area Covered (e.g. just LPA or broader)	In house, externally commissioned	Key stakeholders who need to input	Dependencies with other evidence documents
[Strategic Environmental Assessment / Environmental Outcome Report] Integrated Impact Assessment	LPA	Hybrid, commissioned in part – initial SA Scoping Report externally commissioned. Integrated Impact Assessment work to be undertaken in house.	Environment Agency; Natural England; Historic England	Site assessment work; baselining and measurable outcomes identification; SHENA; SFRA; Landscape; Biodiversity; Settlement Hierarchy; Heritage; Transport; SHELAA; Site Assessment & Selection; Transport Baseline.
Housing and Employment Needs Assessment (SHENA)	LPA	Commission (Lichfields)	BAE Systems; Housebuilding Industry; Key local employers, residential and commercial agents.	Completed Spatial Strategy; Barrow Rising projections data
Housing Land Supply Evidence (SHELAA)	LPA	In house	Internal Council consultees. External consultees e.g. EA, HE, NE, National Highways, United Utilities	Integrated Impact Assessment; Spatial strategy; SFRA; IDP; Landscape; GIS and digital; Monitoring; Open Space
Strategic Flood Risk Assessment Level 1	LPA	Commission (AECOM)	Environment Agency	Complete NAFRA2 data

Key Evidence	Area Covered (e.g. just LPA or broader)	In house, externally commissio ned	Key stakeholders who need to input	Dependencies with other evidence documents
Strategic Flood Risk Assessment Level 2	LPA	Commission (tbc)	Environment Agency	SFRA Level 1; Water Cycle Study; Sites Assessment; SHELAA
Water Cycle Study	LPA	Commission	Environment Agency; Natural England	SFRA Level 1; Water Cycle Study; Sites Assessment; SHELAA
Transport Evidence Base	WAF area	Commission (Completed 2024-25)	Completed	Cumbria Combined Authority
Transport Assessment (including additional evidence base where required)	WAF Area (to be extended to Cumbria once Cumbria Combined Authority commission)	Commission	National Highways; Cumbria Combined Authority	Transport Evidence Base
[Site (Selection) Assessment] Housing and Employment Site Selection Assessment	LPA	In house	Statutory Consultees	SHENA; SFRA
Whole Plan Viability Report	LPA	Commission	Developers; site promoters; planning and viability consultants; Registered Providers; community and neighbourhood groups	SHENA; SHELAA; IIA; IDP

Key Evidence	Area Covered (e.g. just LPA or broader)	In house, externally commissio ned	Key stakeholders who need to input	Dependencies with other evidence documents
Water Cycle Study	LPA	Commission	Environment Agency; Natural England	SFRA Level 1; Water Cycle Study; Sites Assessment; SHELAA
Transport Evidence Base	WAF area	Commission (Completed 2024-25)	Completed	Cumbria Combined Authority
Transport Assessment (including additional evidence base where required)	WAF Area (to be extended to Cumbria once Cumbria Combined Authority commission)	Commission	National Highways; Cumbria Combined Authority	Transport Evidence Base
[Site (Selection) Assessment] Housing and Employment Site Selection Assessment	LPA	In house	Statutory Consultees	SHENA; FRA
Whole Plan Viability Report	LPA	Commission	Developers; site promoters; planning and viability consultants; Registered Providers; community and neighbourhood groups	SHENA; SHELAA; IIA; IDP
Gypsy and Traveller and Travelling Show People Assessment	Cumbria (joint exercise with Cumberland/ LDNPA)	Hybrid – support of external specialist	Gypsy and Traveller communities; Cumberland; LDNPA	IIA; SHELAA; Site assessment

Key Evidence	Area Covered (e.g. just LPA or broader)	In house, externally commissioned	Key stakeholders who need to input	Dependencies with other evidence documents
Open Space Study	LPA	Hybrid Commissioned in part (scoping and audit methodology) Audit and needs and standards to be undertaken in house	Town and Parish councils; Environmental and wildlife organisations; community groups	Site assessment work
Outdoor Sports Facilities Needs Assessment and Strategy (Playing Pitch Strategy)	LPA wide	Commissioned (Sports Planning Consultants)	Sport England, Sports National Governing Bodies	Partial update will be required to confirm position arising from planned growth in new Local Plan
Habitat Regulations Assessment	LPA	Commission	Environment Agency, Natural England	Informs all area of the Local Plan
Local Aggregates Assessment	Includes Cumberland Council and Lake District National Park Authority (minerals planning authorities)	Internal	North West Aggregates Working Party	
Waste Needs Assessment	Includes Cumberland Council and Lake District National Park Authority (waste planning authorities)	Commission	Internal: waste services (Cumberland and Westmorland and Furness)	Site selection

Key Evidence	Area Covered (e.g. just LPA or broader)	In house, externally commissioned	Key stakeholders who need to input	Dependencies with other evidence documents
Strategic Landscape Character Assessment (Stage 1)	Cumbria (joint exercise with Cumberland)	Commission		Stage 1 completed
Local Landscape Character Assessment Stage Two	LPA	Commission		SHELAA; Site Assessments; Settlement Hierarchy; Open Space Study; Integrated Impact Assessment
Renewable Energy Generation Potential and Suitable Areas and District Heat Networks	To be scoped in more detail	To be confirmed	To be confirmed	To be confirmed
Land Stability Desktop Study	Barrow	Commission	Barrow Rising	SHELAA; Viability assessments; IDP; IIA; SFRA
Morecambe Bay Strategic Mitigation	Morecambe Bay	Commission	Wyre and Lancaster Councils	To be confirmed
SEA Screening	LPA	Internal	None	IIA
Design Code	LPA	Commission		Completed
Settlement Study and Hierarchy	LPA	Internal	Supportive work with Cumberland; LDNPA	Sustainability Appraisal, transport, SHENA.
IDP Baseline Report inc transport and highways	LPA	Commission	Infrastructure Planning team	Completed
Infrastructure Delivery Plan (IDP)	LPA	Commission	Infrastructure Planning team	Spatial strategy; viability; CIL

Key Evidence	Area Covered (e.g. just LPA or broader)	In house, externally commissioned	Key stakeholders who need to input	Dependencies with other evidence documents
Settlement Boundaries	LPA	Internal		Settlement hierarchy; SHELAA; SHENA; Landscape character assessment; IDP
Retail Needs Assessment (town centre boundaries inc leisure)	LPA	Internal	Economic Development	SHENA; SHELAA
Local List	LPA	Internal	Historic Environment and Commons	Historic Environment Record

6. Stakeholder Engagement

6.1 Engagement Approach:

The Local Plan has a draft Engagement Strategy. This document sets out how we will communicate with residents, stakeholders and members throughout the plan-making process. It details the opportunities to comment, be involved and to help shape the emerging plan.

The draft Engagement Strategy can be viewed here: [Westmorland and Furness Council Local Plan | Draft Engagement Strategy](#)

7. Budget Overview

7.1 Cost Estimates:

	Period YR 1 2026-27	Period YR 2 2027-28	Period YR 3 2028-29	Total
Staff	£1,327,676	£1,354,230	£1,381,314	£4,063,220

	Period YR 1 2026-27	Period YR 2 2027-28	Period YR 3 2028-29	Total
Evidence/ Consultancy costs	£463,000	£199,500	£199,500	£862,000
Engagement and consultation	£2,000	£2,000	£2,000	£6,000
Examination (PINS costs and programme officer)	£0	£0	£200,000	£200,000
				£5,131,220

Evidence base costs include all baseline data costs.

Engagement and consultation budget relates to the three stakeholder engagement sessions across plan-making.

Examination timeline October 2028 – April 2029. Budget splits between years are estimate at this stage.

Any grant awards received will be in addition to the above cost estimates.

7.2 Budget Reviews:

The budget will be reviewed and changes approved by the Local Plan Programme Board.

Changes to the budget will trigger a review when there is a significant change to the programme scope, where there are increased costs within a workstream or where additional evidence is required.

Monthly budget reviews will be conducted by Local Plan managers and an officer from the finance team.

8. Risks and Mitigation

8.1 Summary of Key Risks Identified:

Risk	Likelihood – high, medium, low	Risk level – high, medium and low	Mitigation
<p>There is a risk of further planning reforms, change and uncertainty at a national level;</p> <p>Caused by the new National Planning Policy Framework, national politics and delays in the provision of information from Government;</p> <p>Resulting in delays to the plan-making timeframe, not getting a plan adopted within 5 years of LGR and risk to the delivery of nationally significant growth (and national security).</p>	High	Medium	<p>Proactive liaison with MHCLG and requests for support and advice, including the earliest possible sight of standard templates, requirements for gateway checks, national planning policies etc.</p> <p>Wider horizon scanning of government policies.</p> <p>Robust programme management.</p> <p>Proactive engagement with Planning Advisory Service to input into documentation templates and to have early access to available documentation.</p> <p>Participation in peer group activity.</p> <p>Team Barrow stakeholder engagement to influence Government departments and provide visibility.</p>
<p>There is a risk that the Local Plan is not aligned with W&FC Policy and Strategy;</p> <p>Caused by lack of corporate resource/input;</p> <p>Resulting in the organisation not being aligned behind the Local Plan and consequent risks to delivery.</p>	Low	Low	<p>Ongoing and proactive engagement with other directorates through the Local Plan Strategy Group.</p> <p>Participation in other corporate groups eg intelligence workshops, public health, housing strategy work, climate change, natural environment.</p> <p>Participation in Council Policy Network.</p> <p>Involving other teams in workstream development where relevant</p> <p>Ensuring the Local Plan aligns with the Transformation Plan.</p>
<p>There is a risk that the decisions take too long;</p> <p>Caused by governance processes;</p> <p>Resulting in delays to the Local Plan Programme.</p>	Low	Low	<p>Regular Local Plan Members Steering Group and maintain regular engagement with Cabinet Member</p> <p>Development of Local Plan Programme Board to expediate processes and removal of unnecessary steps in decision making.</p>

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There is a risk that the capacity of the team is compromised by requests to support neighbourhood planning and other activity; Caused by increased demand from Communities preparing Neighbourhood Plans simultaneously and other work needing to be undertaken by planning policy team; Resulting in critical resources being diverted away from the Local Plan.	Low	Medium	Be aware of NPB programme/ intention to prepare. Robustly respond to requests to ensure NPB understand requirements and resource implications. Clear protocol setting out process and to manage expectations. Identify a dedicated resource to deal with NDPs – Bluestone Planning commissioned. Government removal of neighbourhood planning grants reducing likely future requests. Escalation of emerging issues to Programme Board.
There is a risk that the Local Plan raises public expectations about issues/matters it will address, but which are beyond the remit of the Local Plan; Caused by lack of understanding about the LP remit/scope Resulting in disenfranchisement, poor PR for W&FC and an increase in the no. of communities seeking to prepare a Neighbourhood Plan.	Medium	Medium	Frequent, clear and robust communication. Communication and Engagement Strategy which explains communities' role in the process and how and when they will be engaged and consulted. Public consultation exercises engaging with local communities.
There is a risk that the Local Plan raises elected members' expectations about issues/matters it will address, but which are beyond the remit of the Local Plan or wanting policies to be more ambitious; Caused by lack of clear communication about the LP remit/scope; Resulting in not providing the necessary approvals throughout the Local Plan preparation process and wider support.	Low	Low	Frequent, clear and robust communication with Cabinet. Importance of internal communication with service areas - builds understanding and focus. Clear governance arrangements to outline how decisions will be taken. Local Plan Members Steering Group held regularly to aid communication.

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<p>There is a risk that Stakeholders (Statutory Consultees) do not 'buy in' to the strategic aims of the new Local Plan;</p> <p>Caused by conflicting objectives and priorities Resulting in objections being raised and local plan policy not being delivered.</p>	Medium	Medium	<p>Proactive engagement, including sharing of programme timeline.</p> <p>Ensure W&FC's information and ask is co-ordinated, user friendly and clear about requirements.</p> <p>Active and ongoing infrastructure planning.</p>
<p>There is a risk of not having an adequate Planning Policy resource (number and skills) to deliver the Local Plan;</p> <p>Caused by ongoing pressure of reduced timescales; nationally significant growth pressures (new NPPF targets); delivery of CIL changes; problems with staff retention and recruitment;</p> <p>Resulting in not having enough resource to deliver the Local Plan.</p>	Medium	Medium	<p>Strong programme management and effective PID.</p> <p>Effective staff management and workload planning.</p> <p>Clear about requirements (what we need and when)</p> <p>Make case for additional resource (e.g. dynamic pursuit of apprenticeship).</p> <p>Planning Reshaping now completed. 2 vacant roles still to be filled.</p>
<p>There is a risk of not having an adequate Corporate resource (number and skills) to deliver the Local Plan;</p> <p>Caused by limited capacity and conflicting priorities and awareness of roles, responsibilities and corporate importance an over emphasis on process (legacy);</p> <p>Resulting in key inputs not happening and causing delay to the delivery of the Local Plan.</p>	Medium	Medium	<p>Commitment from Directors to provide resource. Cross Directorate engagement at all levels and leveraging in help from other sections. Identifying areas of common interest.</p> <p>Maintain Local Plan Strategy Group.</p> <p>Ensure timely central support is available (legal, ICT, Finance, HR).</p> <p>Programme Board membership to address issues.</p>

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<p>There is a risk of Stakeholders (Statutory Consultees – internal and external) not having enough resource to input effectively at key stages of the new Local Plan; Caused by external pressures and resource; Resulting in missing or late input and subsequent delays to the preparation of the Local Plan and demonstrating that sites are deliverable.</p>	High	Medium	<p>Early and proactive engagement so they can understand resource implications and plan accordingly. Requests for responses to be as user-friendly and proportionate as possible. External procurement if required to support processes.</p>
<p>There is a risk of additional time and resource required and data duplication, inconsistency and inaccuracies; Caused by not having supportive and fit for purpose IT systems in place; Resulting in inefficiencies and delays to the Local Plan programme.</p>	High	High	<p>The creation and maintenance of a corporate GIS system and data governance arrangements. Configuration of MasterGov Policy Monitoring module underway. New corporate IT procurement strategy. Acquiring tablets to assist with data input and consultation.</p>
<p>There is a risk of speculative planning applications or significant development coming forward on unallocated sites; Caused by the government introducing new NPPF targets which are challenging to meet; Resulting in uncontrolled development, inability to plan infrastructure and reduced quality development.</p>	Medium	Low	<p>Establishment of robust Design Code to ensure quality of design Close working between Policy and DM to agree standards for new development and to defend appeals.</p>

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<p>There is a risk that Local Plan development does not keep pace with Team Barrow masterplanning and the overall AUKUS project;</p> <p>Caused by different priorities and resource constraints of the two programmes;</p> <p>Resulting in misaligned plans, duplication of work or inconsistencies across the Barrow geography.</p>	Low	Low	<p>Partnership working with Team Barrow.</p> <p>Housing Taskforce for Team Barrow being led by Local Plan Assistant Director.</p> <p>Ongoing communication and engagement across both teams</p> <p>Planning Policy team part of the Growth Strategy team.</p>
<p>Risk that W&F does not meet the statutory deadline to have a new Local Plan in place by April 2029 as required by MHCLG;</p> <p>Caused by delays in guidance and unknown or unclear processes and lack of planning resource;</p> <p>Resulting in delays to having a local plan adopted.</p>	Low	Low	<p>Partnership with PAS to understand Government direction of travel.</p> <p>Programme timelines developed to understand scenarios.</p> <p>Acceptance that plan will not be in place until 2029 earliest.</p> <p>Timeline adjusted accordingly.</p>
<p>Risk that evidence base workstreams are delayed by data issues;</p> <p>Caused by late publication of, or inaccuracies in critical data produced by third parties (primarily Government agencies);</p> <p>Resulting in delays and cost escalations to the Local Plan and/or insufficiently robust evidence.</p>	Medium	Medium	<p>Close engagement and strong relationships with Government Agencies.</p> <p>Ensuring that key partners are fully engaged in workstreams.</p> <p>Use higher level contacts with agencies to impress the importance of the Local Plan upon them and resolve blockages and delays.</p> <p>Work with other authorities where data concerns are also impacting them.</p> <p>Close management of consultants to understand delays and impact.</p>

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<p>There is a risk that the need for a Cumbria-wide Spatial Development Strategy (SDS) causes delays and/or duplication with Local Plan evidence; Caused by the need for a new mayoral authority (devolution) to have an SDS with similar evidence being gathered to support the document; Resulting in delays, duplication or inconsistencies with W&F Local Plan Evidence Base.</p>	Medium	Medium	<p>Joint working with Cumberland Council and LDNPA. Early introductions to CCA officers as they are onboarded.</p>
<p>There is a risk that partnership working with neighbouring LPAs is suboptimal; Caused by the removal of the legal obligation for Councils to have a Duty to Cooperate on strategic, cross-boundary issues but Cumbria not yet having a mayoral authority in place; Resulting in potential misalignment of data, lack of strategic planning and issues with examination of the Local Plan.</p>	Low	Low	<p>Understand timescales from Directors. Understand meanwhile implications for strategic, cross-boundary issues. Set up meetings with Cumberland and LDNPA to understand the issues and work together to reach solution.</p>
<p>There is a risk that the need to complete Gateway 1 by 30.10.26 causes suboptimal workstream development over Summer/Autumn 2026; Caused by the T&Cs of the Improvement Grant and fixed milestone of 30.10.26; Resulting in possible duplication of work, incomplete evidence or incomplete consultation.</p>	Low	Low	<p>Gateway 1 programme management - critical path defined. Optimal use of resources. Triage of workstreams to focus on priority deliverables.</p>

9. Approval of this PID

Author Name:	Title	
Philippa Ball	Programme Manager	
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Cllr Vicky Hughes	Cabinet Member for Planning and Active Well Being	16/06/2026
Angela Jones	Strategic Director of Communities, Place and Economy	17/06/2026
Gareth Candlin	Director of Planning and Regeneration	01/06/2026

10. Version Control/ Change Log

Date of change (Specifying version)	Author	Reason	Updated Version Title
V2	Helen Houston	Gateway 1 Assessment update: <ul style="list-style-type: none"> • Staff updates • Evidence base updates • Stakeholder engagement details 	WAF Local Plan PID 2026 V2.0