

## CABINET ITEM COVERING SHEET PROFORMA

### **AGENDA ITEM**

### **REPORT TO CABINET**

**14 JANUARY 2016**

### **REPORT OF CORPORATE MANAGEMENT TEAM**

## **CABINET DECISION**

**Environment and Housing – Lead Cabinet Member - Councillor M Smith  
Regeneration & Transport – Lead Cabinet Member – Councillor N Cooke  
Adult Services and Health – Lead Cabinet Member - Councillor J Beall**

### **VICTORIA ESTATE REGENERATION: URBAN VILLAGE LIVING (PROMOTING ACTIVE AND HEALTHY AGEING)**

#### 1. Summary

To update members on the detailed option appraisal which was recently undertaken to explore the feasibility of developing the Victoria estate as an exemplar Urban Village, providing housing exclusively for those over the age of 55 years. Following conclusion of this exercise to seek Cabinet approval to progress the 'Urban Village Living' concept through to detailed design and planning stage.

As members are aware, the Victoria estate is uniquely placed in terms of its proximity to the municipal heart of Stockton and its ease of pedestrian access to the town's retail and leisure facilities. The site location offers an opportunity to develop a new housing offer for those aged over 55 years, one that currently does not exist within the Borough. The scale of the regeneration proposed would transform Victoria and bring significant inward investment which would impact positively on supporting the Council's broader vision for a vibrant Stockton town centre.

#### 2. Recommendations

Cabinet are asked to:

1. Support the progression of the project through to the next stage (planning, design and detailed feasibility).
2. Recognise that the marketability of any future development will be influenced by its surroundings (actual and perceived). Cabinet are therefore asked to support an evaluation of the site boundaries and bring proposals / costs back to a future Cabinet meeting.
3. To delegate to the *Corporate Director of Development and Neighbourhood Services* in consultation with the *Director of Law and Democracy*, approval to formalise the Council's relationship with Thirteen by entering into a Memorandum of Understanding which would detail the role and responsibilities (including financial) of both parties in undertaking the next stage of the project.

4. Agree that following completion of planning, design and detailed feasibility a further report be brought back to Cabinet.
5. Note that there is no additional call on resources to meet the Councils financial commitment to progress the project through to the next stage (as detailed in paragraph 14 of this report).

### 3. Reasons for the Recommendations/Decision

To develop a new housing offer for those aged over 55 years, one which promotes independent living, health and well-being and supports a number of the Councils strategic agendas (enabling residents of our Borough to live independently as they age and supporting economic growth through physical regeneration and investment).

### 4. Members' Interests

Members (including co-opted Members) should consider whether they have a personal interest in any item, as defined in **paragraphs 9 and 11** of the Council's code of conduct and, if so, declare the existence and nature of that interest in accordance with and/or taking account of **paragraphs 12 - 17** of the code.

Where a Member regards him/herself as having a personal interest, as described in **paragraph 16** of the code, in any business of the Council he/she must then, **in accordance with paragraph 18** of the code, consider whether that interest is one which a member of the public, with knowledge of the relevant facts, would reasonably regard as so significant that it is likely to prejudice the Member's judgement of the public interest and the business:-

- affects the members financial position or the financial position of a person or body described in **paragraph 17** of the code, or
- relates to the determining of any approval, consent, licence, permission or registration in relation to the member or any person or body described in **paragraph 17** of the code.

A Member with a personal interest, as described in **paragraph 18** of the code, may attend the meeting but must not take part in the consideration and voting upon the relevant item of business. However, a member with such an interest may make representations, answer questions or give evidence relating to that business before the business is considered or voted on, provided the public are also allowed to attend the meeting for the same purpose whether under a statutory right or otherwise (**paragraph 19** of the code).

Members may participate in any discussion and vote on a matter in which they have an interest, as described in **paragraph 18** of the code, where that interest relates to functions of the Council detailed in **paragraph 20** of the code.

### Disclosable Pecuniary Interests

It is a criminal offence for a member to participate in any discussion or vote on a matter in which he/she has a disclosable pecuniary interest (and where an appropriate dispensation has not been granted) **paragraph 21** of the code.

Members are required to comply with any procedural rule adopted by the Council which requires a member to leave the meeting room whilst the meeting is discussing a matter in which that member has a disclosable pecuniary interest (**paragraph 22** of the code)

**AGENDA ITEM**

**REPORT TO CABINET**

**14 JANUARY 2016**

**REPORT OF CORPORATE  
MANAGEMENT TEAM**

**CABINET DECISION**

**Environment and Housing – Lead Cabinet Member - Councillor M Smith  
Regeneration & Transport – Lead Cabinet Member – Councillor N Cooke  
Adult Services and Health – Lead Cabinet Member - Councillor J Beall**

**VICTORIA ESTATE REGENERATION: URBAN VILLAGE LIVING (PROMOTING ACTIVE AND HEALTHY AGEING)**

**SUMMARY**

To update members on the detailed option appraisal which was recently undertaken to explore the feasibility of developing the Victoria estate as an exemplar Urban Village, providing housing exclusively for those over the age of 55 years. Following conclusion of this exercise to seek Cabinet approval to progress the 'Urban Village Living' concept through to detailed design and planning stage.

As members are aware, the Victoria estate is uniquely placed in terms of its proximity to the municipal heart of Stockton and its ease of pedestrian access to the town's retail and leisure facilities. The sites location offers an opportunity to develop a new housing offer for those aged over 55 years, one that currently does not exist within the Borough. The scale of the regeneration proposed would transform Victoria and bring significant inward investment which would impact positively on supporting the Council's broader vision for a vibrant Stockton town centre.

**RECOMMENDATIONS**

Cabinet are asked to:

1. Support the progression of the project through to the next stage (planning, design and detailed feasibility).
2. Recognise that the marketability of any future development will be influenced by its surroundings (actual and perceived). Cabinet are therefore asked to support an evaluation of the sites boundaries and bring proposals / costs back to a future Cabinet meeting.
3. To delegate to the *Corporate Director of Development and Neighbourhood Services* in consultation with the *Director of Law and Democracy*, approval to formalise the Councils relationship with Thirteen by entering into a Memorandum of Understanding which would detail the role and responsibilities (including financial) of both parties in undertaking the next stage of the project.
4. Agree that following completion of planning, design and detailed feasibility a further report be brought back to Cabinet.

5. Note that there is no additional call on resources to meet the Councils financial commitment to progress the project through to the next stage (as detailed in paragraph 14 of this report).

## DETAIL

### Background

1. As members may recall, approval has previously been granted (June 2012: Cabinet Decision Record D120066) to progress a 'residential only' led redevelopment of the Victoria estate. At the time of supporting this recommendation it was envisaged that the sites future re-development would provide mixed tenure family housing with the potential inclusion of an extra care housing scheme. Since 2012 housing market conditions have changed significantly and a further report was presented to Cabinet in November 2014 which explained the lack of appetite from private sector house builders for brownfield development sites not only in Stockton but the wider Tees Valley, coupled with their clear preference for greenfield housing sites. The November 2014 report also noted that there are other potentially competing sites in close proximity to Victoria (including for example Norton Park - formerly known as Swainby Road, North Shore and Whitewater Glade) which were (and are continuing) to deliver predominately new housing for the traditional 'family market' and highlighted that at both a local (and national level) there is an inadequate supply of housing options for an increasingly growing older population. Taking these issues into consideration Cabinet supported the proposal to undertake a detailed option appraisal to explore the concept of redeveloping the Victoria site as an exemplar 'Urban Retirement Village' providing housing exclusively for those aged over 55 years (Decision Record: D140108).
2. To undertake the option appraisal exercise a number of work streams were established which brought together colleagues from a range of different disciplines from both the Council and the Thirteen Housing Group. Both organisations worked collectively on the appraisal as both have a shared interest in the site (as a result of joint land ownership and commitments made in the Stock Transfer Agreement). The work streams were:
  - Market analysis
  - Adult social care
  - Public health and wider health services
  - Voluntary and community sector
  - Technology
  - Gateway and connectivity
  - Economic growth and wider regeneration benefits
  - Funding options
  - Delivery models
  - Financial appraisal and business plan
3. To ensure a robust approach each work stream had a clear, pre-agreed remit which was signed off by an officer project board. The officer board was established to provide direction and leadership to the option appraisal exercise; it is chaired by the *Corporate Director of Development and Neighbourhood Services* and includes senior managers from Public Health, Finance, Housing, Adult Social Care, Economic Growth & Development Services and the Thirteen Housing Group.
4. The various work streams considered and evaluated information from a variety of data sources including; demographic information, Experian Mosaic (intelligence / modelling data to understand potential consumers within the market), external reports (such 'Village Life': International Longevity Centre, 'Colour Report': McCarthy and Stone and 'Better Lives, Health, Future': Extra Care Charitable Trust/Aston University etc.), soft market testing (local estate agents) and analysis of existing and best practise including site visits. It became apparent in the evaluation that a number of work streams were inter-linked and others, particularly the

financial work streams could not be progressed in any great detail until firm decisions regarding the scope/remit of the scheme have been agreed.

#### Option appraisal conclusion/key findings

5. The conclusions of each work stream have been subject to scrutiny, challenge and evaluation by the officer project board. In addition the board have co-opted in (as required) appropriate external expertise to support this process. The officer board concluded that whilst it was not possible to give 100% proof of concept, the proposal has been robustly challenged and that on balance there is sufficient evidence to recommend to Cabinet that the project progresses to the next stage (detailed design and planning).
6. The information detailed below is intended to provide Members with an insight into some of the key conclusions identified by the various work streams:
  - In line with national trends, the biggest demographic change in our Borough will be the number of people aged 65 and over. Between 2014 and 2020 the number of people aged 65+ is forecast to increase by 6,000 people (19%), with those aged 85+ increasing by 1,500 people (41%).
  - Current and pipeline retirement housing options in all tenures (whether specialist housing or general bungalow accommodation) are underdeveloped within the Borough and will not address current or projected need.
  - Local estate agents have advised that housing demand from this demographic group outstrips supply in the Borough and in their opinion demand would exist for the type of accommodation proposed.
  - The housing aspirations of this segment of the population include access to services, peace of mind and easy to manage accommodation. External evidence also suggests that the views of adult children in influencing the decision of their parents to move (as they grow older) should not be underestimated. Future marketing strategies would therefore need consider and address this issue.
  - In other areas of the country new retirement developments are being built in areas with similar characteristics to Victoria (i.e. urban/commercial location which is in close proximity to residential areas with high levels of deprivation).
  - The need to remove the barriers to sale/purchase has been identified (successful examples include 'Easy mover' schemes which support individuals to sell their homes / arrange the move etc.).
  - Need (pent up) housing demand from this demographic group does exist within the Borough but the market needs to be developed.
  - Developments of this nature have been evidenced as allowing people to remain in their own homes for as long as they choose (supporting the Councils strategic policy direction of enhancing the range and quality of accommodation for older residents and supporting independent living).
  - Good quality design covering both the physical development (individual properties and communal facilities) and the community ethos of such developments have been evidenced (Aston University) as having a positive impact on health and wider well-being. As they offer the opportunity to focus on preventative interventions targeted at both physical and mental ill-health.

- Community hubs promote opportunities for social interactions aimed at tackling social isolation, loneliness and depression.
- Whilst the proposed Victoria redevelopment is too small to make full time primary care provision a feasible option (as the area is well served by GP and pharmacy provision), there are opportunities to create multi-functional spaces which could be used as treatment rooms (such as nurse/physio appointments), support outreach services (i.e. dementia liaison services) and potentially commercial partners (such as podiatry or chiropody services).
- There are opportunities to engage with the Voluntary Community and Social Enterprise (VCSE) sector to design and develop a range of services within the scope of the development (for example; the delivery of on-site services linked to the building and/or its external surroundings, services which reduce social isolation and building community capacity to the delivery of the care/support service).
- The development needs to be 'future proofed' in terms of technology (specifically broadband connectivity) to ensure it will support assistive technologies / future technological advances which support independent living.
- Analysis of other developments identified that the 'marketability' of the Victoria redevelopment will be influenced by its surroundings (both actual and perceived). Whilst the strength of the site is its proximity to the town centre / local services, issues regarding visibility from Maritime Road and poor interfaces with Norton Road need to be addressed.

#### Proof of concept – the 'Stockton' proposal ('Urban Village Living')

7. There is no single definition of 'retirement housing'; it is often used as a generic term to describe a variety of older persons housing models. As part of the option appraisal a number of models have been explored and it is proposed to bring forward a number of core ingredients from these into the Stockton proposal:
  - Purpose-built, accessible designed buildings that promote independent living and support people to age in place.
  - Property types vary and include apartments, bungalows, houses (or a mix).
  - Properties are fully self-contained, where occupants have their own front doors and tenancies (or leases) which given them security of tenure and the right to control who enters their home.
  - Safety and security is built into scheme design.
  - Access to accommodation (regardless of tenure) is age restrictive (55+yrs).
  - The provision of communal spaces and facilities are flexible in terms of their use and benefit both residents and the wider community.
  - 'Community benefit' is part of the concept and ensures that developments are not insular, rather they are outward facing into terms of their linkages with the broader community creating a sense of vibrancy within the development.
8. Members are asked to note that the 'Stockton proposal' is not an extra care model. Whilst there may be similarities to traditional extra care developments (such as Meadow field House in Thornaby and Aspen Gardens in Hardwick) in terms of the quality of accommodation, this proposal differs in that accommodation units will **not be linked** to an assessment of an individual's social care needs. The '*bespoke*' Stockton model proposed offers the flexibility to deliver care and support to individuals should their health and mobility needs deteriorate. Working closely with the *Director of Public Health* there are opportunities to explore and develop new care and support models. These models will focus on prevention and supporting

people to be independent as they age (linking into community activities and through health and well-being services).

9. In essence the Stockton scheme would:

- Support the purchase or renting of accommodation based on lifestyle choice for those aged 55+ years (rather than an assessed care need).
- Enable care and support (at varying levels) to be made available (on site) as and when it is required. This would be provided to the individual in their home.
- Provide an improved housing offer, meeting new and emerging housing markets and aspirations by targeting a diverse customer base (for example those seeking to downsize, last time buyers as well as those seeking more traditional retirement living).
- Accommodation would be tenure blind. It is anticipated that the majority of units will support homeownership (including outright sale and intermediate sale options), however all units will be affordable by their nature as sale or rental values will be reflective of the location and target market.
- The ethos of the scheme will be to promote independent living and healthy ageing.

#### Supporting broader Council strategic priorities

10. The 'Urban Village Living' concept proposed will not only provide a unique opportunity to provide an exemplar new housing development, it will intrinsically support a broader range of council objectives including:

(a) Supporting the adult social care and broader health care agendas:

- As referenced throughout this report, a development of this nature is aimed at promoting healthy ageing.
- It would do this by focusing on prevention and early intervention, promoting well-being, supporting re-enablement, supporting access and helping to deliver improved outcomes for residents, carers and families.
- Through integrated working it offers the potential to deliver health and social care efficiencies (providing an alternative to residential care, preventing unplanned hospital admissions and supporting timely discharge for example).

(b) Supporting the Boroughs wider economic and regeneration agendas:

- Given its close proximity to Stockton Town Centre, this housing redevelopment would support the Councils vision for 'a modern, successful and vibrant town'. It would deliver multi-million pound inward investment and attract a new demographic supporting town centre/urban living.

#### Next steps

11. Pending Cabinet approval, it is proposed that the project moves to the detailed design, planning and feasibility stage. Next steps include for example:

- Reviewing and updating the previous masterplan exercises.
- Moving the scheme to detailed design (in essence being planning ready).
- Undertaking necessary site investigations.
- Procuring appropriate external support services (such as scheme architects / cost advice / marketing services etc.)
- Undertaking detailed financial appraisals.
- Exploring the marketing / branding issues (and the development of a Marketing Strategy)
- Examining in further detail the site boundary/sensitivity issues (detailed in paragraph para 6) and fully costing these options.

- Running in parallel with the above a wider stakeholder event be held (including VCSE partners) to both explain the 'Urban Village Living' proposal and to commence early engagement in terms of scoping joint opportunities.

12. As noted previously both the Council and the Thirteen Group have a joint interest in this site, on this basis it is proposed that Cabinet support the formalisation of this relationship. This would will take the form of a Memorandum of Understanding, Cabinet are asked to delegate authority for negotiating and the signing such an agreement to the *Director of Development and Neighbourhood Services in consultation with the Director of Law and Democracy*). Members are asked to note that this does not commit the Council into a legally binding arrangement with Thirteen rather it formalises current joint working and financial expenditure required to successfully complete the next stage of the project.
13. Pending Cabinet approval the Council and Thirteen will work collectively to progress the project through the detailed planning, design and feasibility stage (with the Victoria Board continuing to give steer and leadership). As part of this exercise options for project delivery in partnership with Thirteen will be explored. Once complete a further report will be presented back to Cabinet.

## FINANCIAL IMPLICATIONS

14. Paragraph 11 of the report provides an overview of the next steps, it is estimated that this will require expenditure of up to £500k (to cover the cost of range of services including specialist consultancy services including architects/cost advise and marketing as well as completing the extensive site investigation works which will be required). As the Council and Thirteen have a joint interest in the site, expenditure incurred in progressing the next stage of the project will be split equally between both parties. The Council's share of these costs will be met from the current Victoria regeneration budget.

## LEGAL IMPLICATIONS

15. None directly from this report.

## RISK ASSESSMENT

16. Low risk.

## COUNCIL PLAN THEMES

17. The proposed redevelopment directly support the following Council Plan themes:

Economic Regeneration and Transport: as detailed within the body of the report the redevelopment of Victoria will support the economic regeneration of Stockton town centre.

Environment and Housing: the proposed redevelopment would deliver a range of additional housing options for the boroughs residents as they age (across all tenures).

Safer Communities: any future redevelopment would be designed to ensure a sustainable and safe community.

Health and Wellbeing: the provision of an Urban Village Living would promote active and healthy ageing.

Adults: the proposed redevelopment would create a high quality environment for both current and future generations of the Boroughs population as they age, in a vibrant, safe and healthy environment.



Arts Leisure and Culture: the proposed scheme provides the opportunity to integrate the provision of arts, leisure and cultural activities.

## **EQUALITIES IMPACT ASSESSMENT**

18. As Cabinet is not being asked to agree a final delivery strategy for site redevelopment an EIA has not been completed. This exercise will be undertaken before Cabinet are asked to sign off the final scheme proposal.

## **CONSULTATION INCLUDING WARD/COUNCILLORS**

19. Consultation briefings have taken place with the Leader and Cabinet Members for Environment & Housing, Regeneration & Transport and Adult Services & Health.

**Julie Nixon**  
**Transformation Team**

**Name of Contact Officer:** Jane Edmonds  
**Post Title:** Strategic Housing Manager  
**Telephone No.** 01642 526682  
**Email Address:** [jane.edmonds@stockton.gov.uk](mailto:jane.edmonds@stockton.gov.uk)

Education related?  
No

### Background Papers

- Victoria Estate Regeneration Proposal. Report to Cabinet 6.11.14
- Housing Regeneration Scheme Update – Victoria Estate. Report to Cabinet June 2012.
- Housing Regeneration Scheme Update – Parkfield/Mill Lane (Phase 2) and Victoria Estate. Report to Cabinet 9.2.12
- Housing Futures: Transfer of Housing Stock to Tristar Homes. Report to Cabinet 18.11.00

### Ward(s) and Ward Councillors

Councillor Kirton – Stockton Town Centre ward  
Councillor Hewitt – Stockton Town Centre ward

### Property

As detailed within the body of the report.