

**To:** Cabinet  
**Date:** 12 July 2023  
**Report of:** Climate and Environment Panel  
**Title of Report:** DRAFT Carbon Reduction and Sustainable Retrofit Guidance for Historic Buildings Technical Advice Note

Summary and recommendations	
<b>Purpose of report:</b>	To present Panel of the Scrutiny Committee recommendations for Cabinet consideration and decision
<b>Key decision:</b>	No
<b>Scrutiny Lead Member:</b>	Cllr Alex Hollingsworth, Panel Chair
<b>Cabinet Member:</b>	Cllr Louise Upton, Cabinet Member for Planning and Healthier Communities; Cllr Anna Railton, Cabinet Member for Zero Carbon Oxford and Climate Justice
<b>Corporate Priority:</b>	Pursue a Zero Carbon Oxford
<b>Policy Framework:</b>	Council Strategy 2020-24
<b>Recommendation: That the Cabinet states whether it agrees or disagrees with the recommendations in the body of this report.</b>	

Appendices	
<b>Appendix A</b>	Draft Cabinet response to recommendations of the Scrutiny Committee

## Introduction and overview

1. The Climate and Environment Panel met on 27 June 2023 to consider the DRAFT Carbon Reduction and Sustainable Retrofit Guidance for Historic Buildings Technical Advice Note (TAN) and the customer experience for householders and other applicants seeking planning permission from the Council for carbon retrofit measures in historic buildings or in the city's conservation areas. The TAN sought to act as one of a number of tools to support applicants who were considering retrofitting their heritage or conservation area property. It was recommended that the Panel consider the TAN and agree any recommendations.

2. The Panel would like to thank Councillor Louise Upton (Cabinet Member for Planning and Healthier Communities), Councillor Anna Railton (Cabinet Member for Zero Carbon Oxford and Climate Justice), Mish Tullar (Head of Corporate Strategy), David Butler (Head of Planning Services), Rachel Williams (Planning Policy and Place Manager), Mai Jarvis (Environmental Sustainability Lead), Rose Dickinson (Carbon Reduction Team Manager) and Daniel Young (Principal Planner) for attending the meeting to answer questions.

### **Summary and recommendations**

3. Councillor Louise Upton, Cabinet Member for Planning and Healthier Communities introduced the TAN. She welcomed the opportunity for Scrutiny to have useful input into the TAN and set the context that it was being presented at the time that the new Local Plan 2040 was being developed. The TAN was intended to act as a helpful guide for residents who were thinking about retrofitting their home and was not meant to be exhaustive. The intention was for the TAN to be published as soon as possible.
4. Daniel Young, Principal Planner added that the current Local Plan 2036 set out the Council's specific policies which would be supported by the TAN, in that it would assist residents in interpreting relevant policies. The aim of publishing the TAN imminently was to enable it to act as a 'bridging document' ahead of the Local Plan 2040 being approved and published; the TAN would subsequently be updated once the Local Plan 2040 was developed. A key aim in updating the TAN from the previous version was to make it shorter and clearer, ensure alignment with the Council's net zero ambitions and help give applicants the best chance of their retrofit application being successful.
5. The Panel agreed that its scope for input to the TAN did not include veering into detailed technical discussion and asked a range of questions, including questions relating to the TAN's scope, accessibility, case studies, best practice, customer experience and whether the Council could go further in supporting retrofit applications.
6. During discussion about accessibility, the Panel felt that the TAN included a lot of technical jargon and the document itself was quite densely worded. The Panel suggested that the TAN's accessibility and usability would be enhanced if these issues were addressed.

***Recommendation 1: That the Council reviews the language used in the TAN to ensure it is accessible to residents and incorporates a glossary to explain technical terms.***

***Recommendation 2: That the Council includes more examples of successful domestic scale retrofit projects, including for non-listed buildings in conservation areas, as well as in listed buildings.***

7. The Panel considered customer experience and questioned the assumptions that had been made around that during the development of the TAN. The TAN had been developed as a mechanism for helping the customer experience, but was only one of a number of tools for doing so. It was accepted that the customer experience in relation to retrofit could be difficult and complex; the

Council could assist in demystifying the process to a point, but there were constraints on the process set by the National Planning Policy Framework that the Council had no control or discretion over.

8. The Panel was advised that the plan was to publish the TAN as soon as possible, as that would allow an understanding to be built around whether or not the document was working for applicants. The Panel queried whether a more appropriate approach might be to engage with individuals and organisations who were currently going through the process and using their feedback to inform the TAN before publication. Officers advised that this had been done to an extent through sharing the TAN with the Zero Carbon Oxford Partnership (ZCOP) and analysis of behavioural insights taken from the Council's website. In addition, the Environmental Sustainability Team held regular discussions with partners in relation to customer experience. There was an urgency in publishing the TAN to offer some guidance and support as the level of demand for retrofit in Oxford was high and increasing.

***Recommendation 3: That the Council challenges its existing assumptions around customer experience in relation to retrofit applications and seeks to engage with organisations and individuals who have gone or are currently going through the retrofit process to understand their experiences and feed those into the TAN and the broader planning process to improve usability and overall customer experience.***

9. The Panel had a broader discussion around whether the Council was going far enough to support retrofit applications when considering what other local authorities, such as the Royal Borough of Kensington and Chelsea, were doing in this space. Consideration was given to the tools available to the Council which could be used to demonstrate its commitment to realising the benefits of and supporting retrofit across the City. The Panel was of the view that the Council needed clearer messaging to applicants that it wishes to actively support them in navigating the retrofit process.

***Recommendation 4: That the Council reviews its existing Article 4 Directions to see whether they create unnecessary obstacles to applicants wanting to install carbon retrofit measures.***

***Recommendation 5: That the Council, looking at the approach taken by the Royal Borough of Kensington and Chelsea, considers using Local Development Orders to make clear that certain low carbon approaches will be approved by the Council.***

10. The Panel was concerned that the language of the draft TAN, and the broader approach that lay behind it, did not strike the right balance between the desire to follow the planning process on the one hand and the need for applicants to have greater certainty about what the Council would and would not allow on the other. It was not sufficiently clear to would-be applicants that the Council would support them through the retrofit process<sup>5</sup> nor was there sufficient clarity about which

measures would be acceptable. The Panel was of the view that householders and applicants would welcome much greater clarity about what measures and approaches would be appropriate in different conservation areas, given that different heritage aspects are important to the designation of different conservation areas.

11. The Panel contrasted the approach and language of the draft TAN with similar guidance for carbon retrofit measures in conservation areas published by Bath and North East Somerset Council, which the Panel felt made clear both that carbon retrofit measures would be encouraged and also gave applicants and householders clear and easy to follow advice on what measures would and would not be acceptable. The Panel felt that the approach taken by Bath and North East Somerset was one that Oxford City Council should follow, in content and in particular in tone and language.

***Recommendation 6: That the Council makes it clear in the TAN and broader messaging that it supports retrofit applications in heritage and conservation areas and will actively support applicants to go through that process.***

***Recommendation 7: That the Council takes a much clearer approach to setting out for householders and applicants what its response will be to proposals for specific retrofit measures, being clear about how that might vary from conservation area to conservation area.***

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