

Table of Engagement in relation to the preparation of the Joint Local Plan

This document addresses action number 7 and was raised at the Matter 2 hearing session:

The Councils to prepare a separate Table of Engagement in relation to the preparation of the JLP only (i.e. removing engagement regarding Oxford City's Local Plan).

This document contains copies of the following:

1. Advice Note
2. Table A: SODC/ VOWH JLP only engagements on housing need
3. Table B: All activities related to housing need

**SOUTH OXFORDSHIRE AND VALE OF WHITE HORSE
JOINT LOCAL PLAN EXAMINATION**

ADVICE NOTE

1. This Advice Note is provided to South Oxfordshire and Vale of White Horse District Councils (“South and Vale”) for the purposes of submission to the Inspectors who are carrying out an Examination under section 20 of the Planning & Compulsory Purchase Act 2004 of the South Oxfordshire and Vale of White Horse Joint Local Plan (“the JLP”).
2. The JLP was submitted for independent examination on 9 December 2024 and the Secretary of State for Housing, Communities & Local Government appointed the Inspectors (“the Inspectors”) to carry out that examination (“the Examination”). The Inspectors held initial hearings as part of the Examination between 3 June and 5 June 2025. At those hearings the Inspector requested that certain actions be undertaken to provide them with further information.
3. One of those actions (“Action No. 7”) is described as:

“The Councils to prepare a separate Table of Engagement in relation to the preparation of the JLP only (i.e. removing engagement regarding Oxford City’s Local Plan).”
4. The context for Action No. 7 is an earlier request set out in the Inspectors’ Preliminary Matters and Initial Questions (Document ID01 in the Examination Library), where IQ14 had asked:

“Can the Councils provide evidence of early and continuing engagement throughout the Plan process specifically on the preparation of the evidence base for housing needs and the requirement for the Plan (as opposed to other Councils’ plans) including the information set out at i – v...”

5. In response to IQ14 (and other Initial Questions) South and Vale submitted a Response to the Initial Questions (Document LPA02) and four Appendices. Appendix 1 is a Table of Engagement (Document LPA02.1). Appendix 2 is Evidence of Engagement (Document LPA02.2). Appendix 3 is a Table of South and Vales' engagement on the withdrawn Oxford Local Plan 2040 (Document LPA02.3). Appendix 4 is Evidence of South and Vales' engagement on the withdrawn Oxford Local Plan 2040 (Document LPA02.4).
6. Notwithstanding that the information on South and Vales' engagement on the withdrawn Oxford Local Plan 2040 ("the OLP") is already separately provided in LPA02.3 and LPA02.4 (and accordingly does not appear in the Table of Engagement in LPA02.1), it appears that Action No. 7 is seeking the removal of information from the Table of Engagement that is concerned with any other engagement by South and Vale which relates to the OLP or to its evidence base (including the Housing & Economic Needs Assessment ("HENA") commissioned by Oxford City Council and Cherwell District Council).
7. An example of such information would be the Table of Engagement entry in LPA02.1 for 27 March 2023 concerning the Minutes of a meeting between South and Vale and Oxford City Council to discuss the consultation response provided by South and Vale to Oxford City Council's consultation on housing need, which included South and Vale's concerns about the methodology of the HENA and about Oxford City's Council's approach to the assessment of its housing needs and identification of unmet needs.
8. The purpose underlying Action No. 7 and the earlier request in IQ14 is to provide the Inspectors with information on activities undertaken by South and Vale that are relevant to the question of whether it would be reasonable to conclude that there has been compliance with the Duty to Co-operate in section 33A PCPA 2004 during the preparation of the JLP. This is a question that the Inspectors must address to satisfy either section 20(7)(b)(ii) PCPA 2004 or section 20(7B)(b) PCPA 2004 (the applicable provision will depend on any views they reach on the separate question of soundness, which is not a matter addressed in this Advice Note).

9. One aspect of the Duty to Co-operate, where (but only where) the preparation of a development plan relates to a “*strategic matter*” as defined by section 33A(4) PCPA 2004, is whether the plan-making authority (as a person subject to the Duty to Co-operate) has “*engage[d] constructively, actively and on an on-going basis in any process by means of which activities*” in relation to the preparation of the development plan, or activities which support such activities, so far as relating to that “*strategic matter*”, have been undertaken, as required by section 33A(2) and section 33A(3) PCPA 2004.
10. A number of other participants in the Examination, including Oxford City Council, have contended that there are “*strategic matters*”, including Oxford’s unmet housing needs, where there has been insufficient or inadequate engagement by South and Vale for the purpose of meeting the requirements of section 33A PCPA 2004.
11. This Advice Note does not discuss the position already advanced at the Examination by South and Vale that Oxford’s unmet housing needs do not, in all the circumstances, give rise to a “*strategic matter*” as defined by section 33A(4) PCPA 2004 (when regard is had to the housing provision made by the JLP for meeting those needs, together with Oxford’s own housing capacity). If that position is accepted by the Inspectors, the question of engagement (and the extent of it) falls away because engagement is only required so far as relating to a “*strategic matter*” arising from the JLP.
12. However, if the question of engagement does remain to be considered, it is important that all evidence that is relevant to engagement which has been provided to the Examination is taken into account by the Inspectors. If relevant evidence on engagement is disregarded in making a decision with regard to the Duty to Co-operate, this would be an error of law.
13. There is no statutory definition of what can constitute engagement.
14. Section 33A(2) PCPA 2004 provides (so far as relevant):
- “In particular, the duty imposed on a person by subsection (1) requires the person –*

(a) to engage constructively, actively and on an ongoing basis in any process by means of which activities within subsection (3) are undertaken,...

15. Section 33A(3)(a) PCPA 2004 provides (so far as relevant):

“The activities within this subsection are –

(a) the preparation of development plan documents,

(b) ...

(c) ...

(d) activities that can reasonably be considered to prepare the way for activities within any of paragraphs (a) to (c) that are, or could be, contemplated, and

(e) activities that support activities within any of paragraphs (a) to (c), so far as relating to a strategic matter.”

16. Whilst the focus for the Inspectors is on the preparation of the development plan that is the subject of the Examination, that does not mean that activities undertaken by the plan-making authority in relation to the preparation of a development plan by a neighbouring local planning authority are necessarily irrelevant to the question of whether any engagement has been constructive, active, and on-going (so far as relating to a strategic matter).

17. Whether such other activities are relevant or irrelevant to the question of whether any engagement has been constructive, active and on-going (so far as relating to a strategic matter) is question of fact and degree. The nature and extent of engagement to be undertaken to comply with the Duty to Co-operate is a matter of planning or evaluative judgment by the person subject to the Duty to Co-operate: see Zurich Assurance Ltd v Winchester City Council [2014] EWHC 758 (Admin), per Sales J at para 110; Barker Mill Estates v Test Valley Borough Council [2016] EWHC 3028 (Admin), per Holgate J at paras 55 and 56. Any such judgments are then to be assessed by the Examining Inspectors in the exercise of their own planning or evaluative judgments, with a substantial or wide margin of appreciation being

given to the judgments of the plan-making authority: see Barker Mill at paras 56 and 57. Transcripts of these High Court Judgments are provided as Appendices 2 and 3 of South and Vale's Matter 2 Statement (WS/1).

18. It is to be noted that the activities within section 33A(3) PCPA 2004 are not limited to "*the preparation of development plan documents*" (section 33A(3)(a)) but also include activities "*that support activities within any of paragraphs (a) to (c)*" (section 33A(3)(e) PCPA 2004). Such a supporting activity could be an activity which assists the preparation of the development plan by clarifying or resolving some evidential matter which may or may not (depending on how or when it is clarified or resolved) require to be addressed by the development plan that is being prepared.
19. Thus, on the subject of the housing provision to be made by the JLP, and whether that gives rise to any "*strategic matter*" to which the Duty to Co-operate applies, the engagement undertaken by South and Vale in the preparation and subsequent examination of the OLP (including engagement in the evidence base on housing needs to be addressed by the OLP) is capable of being regarded as relevant evidence of engagement on an activity which supported the activity of preparing the JLP.
20. This was especially so on the facts here when the JLP and the OLP were being prepared during substantially overlapping timelines and where the approach taken to the establishment of any unmet housing need in the OLP (once adopted) would be material to the assessment of the housing provision that should be appropriately made by the JLP. The JLP was not being prepared in a vacuum but in a factual context in which an immediately neighbouring local planning authority was also preparing a development plan at the same time and both the JLP and the OLP had to assess and make appropriate provision for housing needs.
21. In these circumstances, I consider that if the Inspectors were not to have regard to the activities undertaken by South and Vale which provide evidence of how and when South and Vale engaged with the housing need evidence and housing capacity evidence prepared by Oxford City Council to inform the OLP, when the Inspectors are considering whether the engagement

undertaken by South and Vale for the purposes of preparing the JLP met the requirements of sections 33A(2) and section 33A(3) PCPA 2004, there would be a failure to have regard to relevant evidence and that failure would be an error of law.

22. Consequently, I consider that, whilst it is open to the Inspectors to seek the presentation of a revised Table of Engagement as requested by Action No. 7, and South and Vale are intending to provide information in that format, it would be an error of law were the Inspectors to base their findings of whether it would be reasonable to conclude that South and Vale have complied with the Duty to Co-operate by a consideration of only that information in relation to the question of engagement. For this reason, South and Vale are also submitting to the Inspectors a further revised Table of Engagement, which includes all relevant activities relating to engagement on the assessment of housing needs and housing capacity. I consider that this further revised Table of Engagement needs to be taken into account in any assessment of the question of compliance with the Duty to Co-operate.

18 June 2025

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Appendix 1 – Table of Engagement

This revised Appendix responds to the Inspectors request at the first stage of hearings. It details the engagement we have undertaken, in chronological order, on housing need as a potential strategic matter, on matters related to Oxford City. The entries have been edited to include only content related to housing need and to add further commentary highlighting the substance of the engagement on that subject matter. Table A relates to JLP only activities, and Table B relates to all activities NB this should be read together with the advice note dated 18/06/25.

References are made to Appendix 2 - Evidence of Engagement (LPA02.2) and Appendix 4 (LPA02.4) for the records of meetings where they are noted in this table under the column titled '(Records – (with reference to Appendix 2/4)', with hyperlinks, or links are provided to where records are referenced within the examination library.

***‘Strategic matters’ are topics with potential to give rise to strategic matters but are not necessarily strategic matters meeting the statutory definition in section 33A(4)(a) PCPA 2004 (see further paras 1.19 and 2.1 of CSD09.1)**

KEY:

Blue text	Additions to LPA02.1 / LPA02.3 be focussed on housing need
Green text	Key extracts from records in column iii
	Entries on engagement, not appearing in Table A' but which S&V consider are relevant (see advice note)

Table A – SODC/VOWH JLP only engagements on housing need						
Date	Engagement with	ii) Records (minutes etc reference in Appendix 2/4)	(iii) Outcome, actions or action list (Notes or Summaries)	(iv) Areas of disagreement and how attempts have been made to resolve them	(v) How the engagement influenced the development of the evidence base and Plan policy	How the engagement was constructive, active, and on-going
21/04/2021	OPPO (S&V Chair), Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	001 Minutes	Meeting - In this meeting South and Vale (S&V) confirmed the decision in March 2021 by Full Councils to prepare a Joint Local Plan for S&V and set out initial steps underway on governance structures and working arrangements. OPPO discussed how alignment with Oxfordshire Plan was ideal, and also alignment of end dates for the plan periods. There was a discussion about Oxfordshire Growth Needs Assessment (OGNA) and the 'bookends' (approach to lowest and highest housing numbers to consider). S&V and Cherwell raised queries about looking beyond the standard method.	No points of disagreement Agreement on alignment of plan periods between Oxford and S&V.	Introduced Oxfordshire partners to the beginning of the JLP. Meeting helped to ensure everyone progressed to make sure they aligned with the Oxfordshire Plan (being prepared at that time) and end dates aligned. The discussion on housing numbers for the Oxfordshire Plan 2050 helped identify pros and cons of different approaches. The discussion on the Oxfordshire Plan 2050 included discussions on countywide policy approaches for: energy, sustainable design and construction, water efficiency, flood risk, nature recovery, healthy place making, electric vehicle charging, and strategic environmental allocations. Furthermore, the discussion on OGNA's "bookends" (the approach to setting the lowest and highest	The engagement demonstrates constructive early-stage discussions about local plans in Oxfordshire and agreement on aligning plan periods between Oxford and S&V.

Table A – SODC/VOWH JLP only engagements on housing need						
Date	Engagement with	ii) Records (minutes etc reference in Appendix 2/4)	(iii) Outcome, actions or action list (Notes or Summaries)	(iv) Areas of disagreement and how attempts have been made to resolve them	(v) How the engagement influenced the development of the evidence base and Plan policy	How the engagement was constructive, active, and on-going
					parameters for testing growth) is specifically relevant to the JLP, as at this time, the housing requirement for the JLP was to be set by the Oxfordshire Plan 2050.	
16/06/2021	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	002 Minutes	<p>Meeting - S&V informed other authorities of progress towards a Joint Statement of Community Involvement (SCI) and governance arrangements for the commencement of the JLP.</p> <p>At this meeting all authorities agreed to start collective work on a Joint Housing and Economic Land Availability Assessment (HELAA) Working Group</p> <p>The Oxfordshire Plan team gave an update on the upcoming regulation 18 part 2 consultation, including a question of whether to publish the OGNA as part of the consultation. OPPO agreed to publish the OGNA for comment as part of that consultation.</p>	No points of disagreement	<p>Collective agreement on the Joint HELAA methodology which was developed in the following months. This informed the methodology for the S&V HELAA and all Oxfordshire authorities preparing plan have aligned to the Joint HELAA methodology agreements.</p> <p>The discussion on OGNA, and whether to include it as part of the public consultation is specifically relevant to the JLP. At this time, the housing requirement for the JLP was to be set by OxPlan 2050.</p>	The engagement resulted in an effective collective agreement and a joint HEELA methodology report. All Oxfordshire authorities producing local plans have aligned their individual HELAA approaches to this joint methodology, which is helpful to have more productive capacity discussions, especially at Oxford who have previously exported unmet housing need because of capacity constraints.
11/08/2021	OPPO (West Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	003 Minutes	<p>Meeting - Discussion on housing land supply with an offer from S&V to create a template to help all authorities to collect and share information on housing lead-in times and build-in rates to help inform these in Oxfordshire.</p> <p>The Oxfordshire Plan team informed that the Regulation 18 Part 2 consultation was underway.</p>	No points of disagreement	<p>Sharing information on lead-in times and build out rates was an idea to help inform housing supply numbers by using our own (S&V) averages and supplementing with additional information from other neighbouring districts.</p> <p>The ongoing consultation on the OxPlan is specifically relevant to the JLP. At this time, the housing requirement for the JLP was to be set by OxPlan 2050.</p>	This engagement demonstrated how S&V took a positive and collaborative approach to shared challenges in Oxfordshire like housing monitoring, with an offer of forming practical solutions to help us all progress our evidence gathering.
20/08/2021	OPPO (West Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	004 Email	Email - Following discussion at the 11 August OPPO on the next stages of Oxfordshire Plan 2050, S&V sent an email proposing a template for collation of data of housing lead-in times and build out rates. This was in relation to initial OGNA work including implications for the Districts' five year housing land supply calculations. S&V highlighted the urgency for coming to an agreement on housing requirement figures. Issue to be	No points of disagreement	Sharing of information on housing delivery and approaches to supply.	As row above, this engagement demonstrated how S&V took a positive collaborative approach to shared challenges in Oxfordshire like housing monitoring, with S&V following through the discussion at OPPO by circulating a

Table A – SODC/VOWH JLP only engagements on housing need						
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			addressed by Heads of Planning in context of work needed to follow the OGNA.			template to help us all progress our evidence gathering.
20/10/2021	OPPO (West Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	005 Minutes	Meeting - All districts provided a brief overview and written update of key plan progress, including the spatial strategy, impact of the OGNA on 5YHLS and affordable housing. Presentation on community led housing delivery across the county. Discussion on housing delivery including consistent data back to 2011 as well as aligned forward trajectory figures in Oxfordshire. There was discussion about potential coordination of Local Plan evidence base, which was agreed would help alignment across Oxfordshire and achieve money savings. An action was taken away for all Districts to convene in November 2021 to discuss their recent commissions. Discussion on need to update IDPs which would be held at the November 2021 meeting. S&V flagged the urgency of coming to an agreement on housing requirement in relation to work on the OGNA, and this was agreed to be discussed at HoP meeting.	No points of disagreement	Helped clarify the list and timetable for preparation of studies at the Oxfordshire Plan 2050 scale and pave the way for joint local plan commissions e.g. GTAA. It was also a meeting where all Oxfordshire partners were aligned on housing delivery (past and future).	This engagement shows the degree of alignment on housing delivery (both past and future), with no points of disagreement noted. It is S&V productively engaging by pressing for the need for agreements being need about housing requirements following early OGNA work.
30/11/2021	OPPO (West Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	006 Agenda and Minutes	Meeting - Meeting to discuss on potential joint commissions or alignment of evidence base - local plans and Oxfordshire Plan 2050. This follows the meeting of 20/10/2021 which set the scope for this meeting. In relation to housing, the potential for joint local housing need assessments and land availability / capacity was discussed.	No points of disagreement	Helped clarify the list and timetable for preparation of studies at the Oxfordshire Plan 2050 scale and pave the way for joint local plan commissions e.g. GTAA.	This meeting is a demonstration of the alignment sought in the interest of presenting a well-coordinated approach to plan making at strategic and local scales. The discussion on OGNA and the specialist housing need update to consider affordable housing needs is directly relevant to how the JLP was dealing with these matters at the time.
15/12/2021	OPPO (West Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	007 Minutes	Meeting - The Oxfordshire Plan 2050 lead raised the potential need for a further focussed Oxfordshire Plan consultation particularly on the spatial strategy as too big a leap to Reg 19. Implications for delays to local plan timetables discussed. Discussion on whether Oxfordshire Plan 2050 included too many policies. There was also some discussion about the inter-relationship with District level SHLAA/HELAA type assessments and site option assessment work for the Oxfordshire Plan 2050. Scope for aligning evidence base reports between the Oxfordshire Plan 2050 and local plans, and between local plan on cross-boundary issues was discussed, with an action for the Oxfordshire Plan 2050 lead to prepare a brief note. There was also some discussion about the process ahead to translate the OGNA recommendations into a housing need figure.	No points of disagreement	Helped clarify the clearer distinction needed between the Oxfordshire Plan 2050 and local plans. Helped shape plans for where evidence base could be joint/ shared.	This meeting is a demonstration of the alignment sought in the interest of presenting a well-coordinated approach to plan making at strategic and local scales. The discussion on how OGNA outputs could be translated into housing requirements for each local plan is directly relevant to how the JLP would have set its housing need and requirement in the context of the Oxfordshire Plan.
16/02/2022	OPPO (West Chair) S&V, Oxford City,	010 Agenda and Minutes	Meeting - Included general update on Oxfordshire Plan 2050 progress and further evidence on housing need	No points of disagreement	No direct impact on the JLP policies	This meeting demonstrates the alignment on evidence commission on housing need.

Table A – SODC/VOWH JLP only engagements on housing need						
Date	Engagement with	ii) Records (minutes etc reference in Appendix 2/4)	(iii) Outcome, actions or action list (Notes or Summaries)	(iv) Areas of disagreement and how attempts have been made to resolve them	(v) How the engagement influenced the development of the evidence base and Plan policy	How the engagement was constructive, active, and on-going
	Cherwell, West Oxfordshire, Oxfordshire County Council		for that plan. Each LPA provided an update on their own local plan progress.			
06/04/2022	OPPO (West Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	012 Agenda and Minutes	Meeting -The main item was Oxfordshire Plan with an update from the Oxfordshire Plan 2050 lead about a 6 step process including a Member Workshop to be independently facilitated for agreeing key aspects on the Oxfordshire Plan including the housing requirement. Discussion around details of the Oxfordshire Plan 2050 evidence base including the OGNA, with a request for feedback on the draft OGNA methodology. There was also discussion about the Oxfordshire Plan 2050 budget not being sufficient, and a call for the councils to cover costs between them, which raised concerns from Oxford City. Agreed that more regular Oxfordshire Plan 2050 specific meetings of the policy managers would be beneficial e.g. every other week to augment the cycle of OPPO meetings.	Tensions emerging on OGNA methodology, with plans to resolve through written feedback and a 6 step process, escalation to HoP and agreement to more frequent OPPO meetings. It was agreed by all to monitor progress. There was a later (July 2022) 7 step process to securing consensus on the Oxfordshire Plan 2050 developed for the HoP group.	Oxfordshire Plan 2050 to agree the housing requirement at this time (this later changed when Oxfordshire Plan 2050 ceased, and this came within remit of JLP).	This meeting records that there was a recognised difference of views regarding the OGNA methodology, and that we collectively put plans in place to enable the more intensive discussions required to resolve the matter.
12/05/2022	Public consultation including all statutory bodies and neighbouring local authorities	015 Consultation notification	Consultation – This is the JLP Issues Consultation Regulation 18 Part 1 - Public Consultation. Please see Joint Local Plan (examination library reference LPP08) (examination library reference LPP08.1)	For a summary of the comments made and S&V's response please refer to the Regulation 18 Part 1 Issues Consultation Result (examination library reference LLP14)	Feedback from this consultation informed preferred options and alternatives as part of Regulation 18 Part 2 Public Consultation.	Statutory bodies, including those covered by the Duty to Cooperate, were invited to make comments on the consultation.
20/05/2022	All statutory bodies and nearby local authorities	017 Email	Email - Email sent to statutory bodies and local authorities providing details on how they can engage with the following documents as part of the JLP Regulation 18 Part 1 consultation: <ul style="list-style-type: none"> • Duty to Co-operate Scoping Document • Sustainability Appraisal (SA) Screening and • Scoping Report • Habitats Regulations Assessment (HRA) • Scoping Report • Retail and Town Centres Study 	N/A	Feedback to the Regulation Part 1 JLP Issues Consultation informed preferred options and alternatives as part of Regulation 18 Part 2 Public Consultation.	Statutory bodies, including those covered by the Duty to Cooperate, were invited to make comments on the consultation.
08/07/2022	HoP (S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council)	020 Agenda and Notes	Meeting - Discussion about a 7-step process to securing consensus on the Oxfordshire Plan 2050.	No points of disagreement	Oxfordshire Plan 2050 to agree the housing requirement at this time (this later changed when Oxfordshire Plan 2050 ceased and this came within remit of JLP).	This engagement and paper demonstrated that we had an agreed resolution process to resolve differences, including on housing needs and requirements, ranging through from officers up to chief executive and councillor level. This approach was focussed on agreements and shared views about how to progress.
28/07/2022	Oxfordshire Plan team, S&V, Oxford City, Cherwell, West Oxfordshire,	022 Email	Email - South emailed comments and an attached note from S&V on the OGNA draft methodology, expressing significant concerns. Identical email sent from Vale. Key extracts from this email:	There was disagreement about the methodology for the housing need evidence being prepared for the Oxfordshire Plan (the OGNA) between the authorities. A number of	After work on the Oxfordshire Plan 2050 ended, housing numbers was added to the scope of the JLP, and S&V	This email demonstrates our attempts to press partners for resolutions and answers about the OGNA methodological concerns (the lack of transparency or 'black box' approach

Table A – SODC/VOWH JLP only engagements on housing need						
Date	Engagement with	ii) Records (minutes etc reference in Appendix 2/4)	(iii) Outcome, actions or action list (Notes or Summaries)	(iv) Areas of disagreement and how attempts have been made to resolve them	(v) How the engagement influenced the development of the evidence base and Plan policy	How the engagement was constructive, active, and on-going
	Oxfordshire County Council		<i>'We still have some fundamental concerns with the approach proposed by the OGNA consultants. We have been clear since the drafting of the brief that we expect total transparency from the consultants, which states: "It is anticipated that the updated report will follow the fundamental main approach in the initial report but only after a review of the data, assumptions and methodologies used for the initial report ... It will update and provide further background employment information at the County and district level including providing further detail and updates where needed on the assumptions and methodologies behind the economic forecasts and growth scenarios." (Paragraph 3.1) We believe these inputs and assumptions are fundamental to the methodology. It is important that the consultants do not present outcomes before we understand, and agree, what inputs go into the model for each scenario. We have given specific comments on where we are concerned about this on the attached. Unfortunately we don't think the methodology responds to our previous comments and the brief. I appreciate this is frustrating, but we have been asking for this information since the brief was drafted, and have been asking the consultants for this information for several weeks now.'</i>	technical points remained at issue, including a lack of transparency behind scenarios being proposed. A workshop between the authorities the following week, attended by the Leaders and Chief Executives, led to the issuing of the joint statement about cessation of work on the Oxfordshire Plan 2050 on 3 August 2022.	commissioned a Joint Housing Needs Assessment covering S&V.	from the consultants which we referred to at the hearings) which were not being addressed (and which later translated through to the Oxford and Cherwell HENA). The technical points S&V raised in the accompanying note go to the heart of key assumptions and methodological approaches to calculating housing need.
03/08/2022	S&V, Oxford City, Cherwell, West Oxfordshire	023 Press Release	Press Release - The five councils issued a joint statement following a workshop between the authorities, announcing, with regret, the end of work on the Oxfordshire Plan 2050.	The councils agreed that they were unable to reach agreement on the approach to planning for future housing needs within the framework of the Oxfordshire Plan. The Oxfordshire Plan 2050 work programme ended and planning transitioned to a process focussed on Local Plans. The Councils committed to cooperate with each other and with other key bodies as they prepared their Local Plans.	Agreement that the issues of housing needs would now be addressed through individual local plans for the City and each of the Districts. Housing numbers and other strategic matters were brought into to the scope of the JLP.	
See relevant engagement with HoP meeting on 09/09/2022 in Table B – Agenda and Notes discussing which evidence should be continued jointly						
See relevant engagement with West Oxfordshire District Council on 09/09/2022 in Table B – Email demonstrating S&V and West were not invited to join the Oxford and Cherwell HENA commission						
See relevant engagement with Oxford City Council on 18/11/2022 in Table B – Consultation Response from S&V to Oxford Local Plan Preferred Options						
02/12/2022	OPPO (Cherwell Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	036 Email	Email - S&V emailed the other Oxfordshire authorities with news that the JLP's new LDS had been approved and inviting the other authorities to join S&V in joint evidence studies, including Housing Needs Assessment and the specialist housing needs assessment. The email also asked about whether OPPO would meet again soon.	No points of disagreement	S&V starting to plan housing needs evidence base to support the JLP, inviting all the other authorities to be part of it.	This demonstrates S&V constructively reached out to others in Oxfordshire to collaborate and jointly commission housing evidence.

Table A – SODC/VOWH JLP only engagements on housing need						
Date	Engagement with	ii) Records (minutes etc reference in Appendix 2/4)	(iii) Outcome, actions or action list (Notes or Summaries)	(iv) Areas of disagreement and how attempts have been made to resolve them	(v) How the engagement influenced the development of the evidence base and Plan policy	How the engagement was constructive, active, and on-going
See relevant engagement with Oxford City Council on 15/12/2022 in Table B – Email from OPPO chair to OPPO group about the HENA commission being progressed						
See relevant engagement with HoP on 06/01/2023 in Table B – Email note from Oxford and Cherwell informing of HENA publication on their website						
See relevant engagement with OPPO on 12/01/2023 in Table B – Email agenda indicating discussion about housing need						
See relevant engagement with Oxford City Council on 17/03/2023 in Table B - Consultation response from S&V to Oxford City Council's Regulation 18 (Local Plan Housing Need)						
See relevant engagement with Oxford City Council on 27/03/2023 in Table B – Bilateral meeting about S&V's response to Oxford City Council's Regulation 18 (Local Plan Housing Need)						
19/04/2023	Wokingham Borough Council, Oxfordshire County Council, Cherwell District Council, Buckinghamshire Council, Oxford City Council, Swindon Borough Council, West Oxfordshire District Council	046 Meeting invitation and Minutes	A workshop for neighbouring and nearby local authorities hosted by S&V and consultants from Opinion Research Services (ORS) on the S&V joint Local Housing Needs Assessment. This workshop was an opportunity for other councils to understand work on the project to date and feedback with any questions or clarifications they have on the study. Specialist Housing Need Assessment Workshop provided a presentation on S&V approach to using the Standard Method as our housing need, and setting out the methodology of the specialist housing needs assessment with a Q&A, including a discussion on provisions for elderly, students, capacity to meet unmet need. Oxford expressly sought confirmation that the specialist needs were derived from as assessment based on the Standard Method, and this was confirmed by S&V.	ORS using new data resulting in difference of figures than Oxford City & Cherwell HENA that had been prepared (and disputed by S&V) at that time.	Discussion on new unmet need is required to continue and if necessary through Oxford's examination. It was agreed that an integrated approach will be taken once an ELNA for S&V has been prepared to ensure an appropriate relationship between job and housing growth for the districts - something which is now in dispute. The workshop with other authorities helped share thinking and provide an opportunity for feedback at the start of the process of preparing the S&V JHNA.	Holding a workshop to convene all neighbouring authorities shows S&V reaching out to engage constructively and at an early stage on housing needs evidence for the JLP. Also we were actively and constructively engaging through this workshop as we had recorded and responded to the request from Cherwell that job and homes balance was suggested to be aligned.
See relevant engagement with OPPO on 26/04/2023 in Table B – Agenda and Minutes showing discussions included unmet need evidence and capacity and demonstrates the view that the JLP was capable of assisting if required						
See relevant engagement with Oxford City Council on 26/06/2023 in Table B – Minutes discussing housing need evidence and potential resolutions, capacity and demonstrates the view that the JLP was capable of assisting if required						
See relevant engagement with OPPO on 30/06/2023 in Table B – Agenda and Minutes discussing housing need evidence and SoCG and demonstrates the view that the JLP was capable of assisting if required						
19/07/2023	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	053 Agenda and Minutes	<p>Meeting - Exploratory discussion on county-wide wide and bi-lateral SoCG, some divergence of views, West took an action to research examples of SOCGs from elsewhere.</p> <p>How districts would like to progress the conversations on Oxford's housing numbers led to an offer from Oxford to circulate a paper setting out the figures. West had doubts about using FOP structure. Oxford and Cherwell expressed a preference for using OPPO for unmet need discussions. S&V expressed that a discussion would need to be an officer and member discussion and involve senior officers, so suggested the initial mechanism might be Oxford writing a formal request on unmet need, addressed to the Chief Executive.</p> <p>There was an additional item on approach to calculating unmet need, with a query specifically from S&V about</p>	<p>On Statements of Common Ground, some divergence of views, with S&V expressing preference for bilateral SOCG and others preferring a County -wide SOCG. This is because it was clear that S&V had raised very significant concerns with Oxford's Reg 18 plan and evidence, more than others in Oxfordshire had. Despite this S&V went with the majority view. to try an Oxfordshire wide approach to SoCG.</p> <p>Also discussion on what is the right forum for conversations on unmet needs (FOP/OPPO etc). Oxford subsequently produced a draft note on housing numbers which County,</p>	Discussion on housing numbers helped develop thinking on JLP housing requirement and approach to existing/additional unmet needs.	<p>These minutes and outcome regarding SoCG production show S&V willingness to be active and constructive in our engagements, despite it being clear we may have to respond to Oxford's Regulation 19 in a different way to others in Oxfordshire, given our lack of resolution from earlier plan production stages coupled with no willingness from Oxford to action any resolutions that we thought were going to be progressed.</p> <p>The meeting minutes show that S&V wanted to highlight some practical questions to seek agreement about how our plans will have to consider unmet need over the new plan periods to de-risk our approaches. This is evidence of our ongoing constructive approach when</p>

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			approach to the plan periods in adopted and emerging plans and how this might impact on unmet need numbers.	West, S&V fed back on to help make progress.		there are potentially similar issues in our plans in Oxfordshire.
25/08/2023	Oxfordshire Local Planning Authorities (OPPO leads)	056 Email and attached annotated note	<p>Email - This email responded to a note from the OPPO of 11 August. It reminded Oxford City Council about the expectation that S&V had that methodological issues surrounding the HENA evidence was explored with the HENA consultants.</p> <p>Some key extracts from the draft note:</p> <ol style="list-style-type: none"> Oxford text - ‘This note sets out the City’s calculations to date. It is drafted in the full knowledge that some of the districts intend to challenge the work behind constituent parts of the City Council’s evidence base but is intended to provide a helpful outline of the City’s work thus far’. S&V comment ‘We make specific comments within this note in response to the text included. There are deeper issues with the HENA and the approach to unmet need which remain unresolved and not specifically repeated below but will need to be resolved in future engagement.’ S&V comment ‘We haven’t discussed the contents of our previous responses - S&V are awaiting a response to the key matters of the HENA issues and exceptional circumstances’ Oxford text: ‘The City Council acknowledges that it will need to make the case for the approach taken in the HENA and the exceptional circumstances and that South and Vale intend to challenge the HENA’ S&V comment ‘We cannot seriously discuss types of apportionment until the issues with the amount of unmet need and the exceptional circumstances are responded to.’ Oxford text – ‘Each of the Oxfordshire authorities made provision for the above figures through the last round of Local Plans. In total, the other Oxfordshire districts made provision for and allocated sites to accommodate 14,300 dwellings (14,850 minus the 550 apportioned for Oxford). Many of these sites have started to be delivered or are in pre-application or planning application stages. In addition, nominations agreements over the affordable housing element of that provision have been signed with WODC, SOCG, VOWH.’ 	<p>There remained a disagreement with the methodological concerns with the HENA in relation to new unmet need from Oxford city.</p> <p>This email shows that with the ending of the Oxfordshire Plan 2050, S&V restructured their attendance at OPPO meetings to add a second lead officer and ensure we could engage better on the Duty to Cooperate concerns raised.</p>	The engagement shows S&V taking steps to ensure their engagement setup with other authorities was robust and could be done consistently through OPPO	<p>This email (read in conjunction with the 27 March 2023 minutes, 26 April 2023 minutes and 26 June 2023 minutes) show that we repeatedly expected and sought the resolution on the HENA methodological issues prior to Oxford’s Reg 19, and this email alerts to this not yet being resolved.</p> <p>Key extracts (1 and 4) from the draft note indicated that Oxford were at this point determined to progress the evidence as is, not addressing the significant concerns S&V had raised. Oxford had not sought resolution, despite our repeated asks and repetition of it as shown at key extracts 2 and 3. S&V proposed track changes to key extract 4 say that if Oxford addressed the concerns, it was not inevitable that S&V would challenge their Plan, and that we urged them again, to address our earlier comments.</p> <p>Key extracts (2, 3 and 5) demonstrate our urgency for a resolution, rather than a desire to leave this unresolved.</p> <p>Key extract 6 demonstrates that Oxford were presenting this note with their view that delivery against their current agreed unmet need had started in the period from 2018-2021 (it had in Vale), and they were content that the nomination agreements had been signed. This contrasts with Oxford’s later Reg 19 / examination stage questioning of how this period is dealt with. S&V view on this is that the JLP continues this agreed approach (an approach which this draft paper evidences Oxford were originally content with).</p>

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05/09/2023	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	060 Minutes and Notes	<p>Meeting - For discussion on Oxford's unmet needs, Oxford City Council in advance circulated a draft paper entitled "Note on Oxford's Housing Numbers - August 2023".</p> <p>We circulated updated figures on 11 October 2023 prepared by our monitoring officer.</p> <p>Oxfordshire County Council had also shared a draft paper "Oxfordshire County Council Note - Housing Need and Oxford's Unmet Need" with some calculations and lists of sites (attached).</p> <p>A key extract from the OCC Note: 'More housing could be accommodated in sites already allocated close to Oxford as set out in Table 2... South Oxfordshire 5,900 (950 more than requirement)... VOWH 2,710 (510 more than requirement)... Grand Running total = 17,146 (2,846 more than agreed)'</p>	<p>S&V questioned whether Oxford not sharing their exceptional circumstances case for going above the standard method was a lack of co-operation.</p> <p>Oxford had agreed to review the comments S&V made on the initial paper (in 056) and make a revised version, but S&V specific matters raised on Oxford's evidence were not taken forward by Oxford.</p>	<p>Discussion on housing numbers helped develop thinking on JLP housing requirement and approach to existing/additional unmet needs. The numbers presented by OCC showed that if the Standard Method was used to calculate Oxford's needs there would be no additional unmet need, allowing for Oxford's assessment of its capacity and the agreed contributions from provision already made by adopted local plans. The numbers also showed that even if the Oxford HENA approach was used, there was sufficient surplus capacity within the existing provision to meet the suggested Oxford need and there would be no additional unmet need. These figures reassured S&V that the emerging JLP was robust enough to accommodate any needs demonstrated by Oxford, however the methodological disagreement was resolved, without needing to change the proposed JLP strategy or the proposed JLP allocations.</p>	<p>The OCC note demonstrates that S&V were engaging on specific discussions about potential solutions to new unmet need. This was constructive in the context that S&V had been challenging the evidence behind new unmet need, and given that Oxford were not making any attempt to resolve those challenges. Working on the County note is evidence of our continued discussions about how the JLP could accommodate unmet need.</p>
03/10/2023	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	063 Minutes and Notes	<p>Meeting - This OPPO was focussed on an in-person workshop on a potential structure of an Oxfordshire SOCG, to be structured around the outcomes of the Oxfordshire Strategic Vision. Meeting agreed to use the proposed structure as the basis and spent the rest of the meeting collectively working it, populating ideas for points that could be documented under each objective.</p>	No points of disagreement	<p>This was the start of collective work on drawing up an Oxfordshire-wide SOCG.</p>	<p>This demonstrated S&V's constructive engagement on the Countywide SoCG in establishing its structure. This work developed into the Oxfordshire-wide SoCG that supported the Oxford Local Plan, and then later the version that supports the JLP (DUC02).</p>
07/11/2023	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	069 Agenda and Minutes	<p>Meeting - On housing numbers, Oxford had circulated their legal advice about the HENA and S&V confirmed issues remained outstanding about the HENA.</p> <p>On the joint SOCG, some discussion on structure getting complex if based around the Oxfordshire Strategic Vision, West offered to restructure it.</p>	<p>Disagreement about the HENA, Oxford said they accepted the risks related to their work and if others have concerns that'll be dealt with at examination.</p>		<p>The minutes demonstrate the ongoing attempts by S&V to resolve the matters which we had thought would be resolved following the 27 March 2023 bilateral meeting with Oxford. It also shows us working on the County note, so that is evidence of our continued discussions</p>

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			<p>Some key extracts from the Minutes:</p> <ol style="list-style-type: none"> <i>‘EB stated that there were still planning issues outstanding with regards to S&V concerns on the HENA. RW recognised this was always likely to be the case’</i> <i>CH (West Oxfordshire): ‘if City are happy with the risks related to their work but others have concerns that’ll be dealt with at examination’.</i> 	There was an agreed action to see if Oxfordshire County Council had the information that they needed to update their note on unmet housing need numbers (Note in 060 of LPA02.1).		<p>about how the JLP could accommodate unmet need.</p> <p>These minutes record Oxford stating that the outstanding concerns ‘was always likely to be the case’. As the S&V commentary on the Oxford unmet need note (056) demonstrated, as well as earlier entries since the meeting of 27 March 2023, this was not the case.</p> <p>S&V urged a resolution repeatedly, but the minutes and responses from Oxford show they were not wishing to resolve, and that it was Oxford who saw these matters as being an inevitable examination debate. The same conclusion was drawn by West Oxfordshire in these minutes, with them stating that City will have to be content with that risk.</p>
06/12/2023	OPPO (Oxford City Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	071 Minutes	Meeting - On unmet need, the County Council had updated a draft note to include some newer housing data, suggestion from Cherwell to move some of this material into the emerging joint SOCG. Oxford confirmed they have booked meetings with each authority over the next week or so to discuss housing in more detail, and Oxford will be sending a formal letter requesting help with unmet need very shortly.	<p>Oxford indicated they would be writing formally to districts shortly to help with unmet housing need.</p> <p>It was agreed that the note from OCC would become a working document (no agreement had yet been reached about its contents).</p> <p>Oxford had received the feedback from S&V on the note they prepared, but that paper was not subsequently updated by Oxford.</p>		These minutes show S&V engagement on unmet housing need from Oxford continues through the preparation of SoCG and in the tweaks to the Oxfordshire County Council note on meeting unmet need, which was inputted into on the basis that unmet need sites could be taken forward in the JLP.
12/12/2023	Cherwell District Council	N/A	Meeting - This was a Brief MS Teams discussion between an officer at S&V and one at Cherwell about the previous S&V matters raised regarding the Oxford and Cherwell Housing Needs Assessment and sharing of previous critiques with new officer at Cherwell in an attempt at resolution and understanding.	The discussion was an attempt at understanding and to discuss a possible meeting in early 2024 with Oxford, Cherwell and S&V officers, unless these matters can be covered in the planned Oxfordshire SOCG.	No changes to JLP evidence or policy.	The conversation was constructive by clarifying each authority’s positions on housing evidence in the HENA and the intentions of each local plan going forward.
See relevant engagement with Oxford City Council on 19/12/2023 in Table B – Meeting between S&V and Oxford about Oxford Local Plan						
21/12/2023	Oxford City Council	See Consultation Response (South Oxfordshire) - Doc C in Appendix 4 (LPA02.4)	<p>Consultation Response - A response to Oxford City Council's Consultation on their submission draft (Regulation 19) Local Plan 2040.</p> <p>S&V raised that the Oxford City Local Plan has not been prepared following ongoing, constructive, and active engagement with S&V, highlighting in particular the lack of engagement on matters of housing need, including the choice to depart from the Standard</p>	Continued disagreement over the decision to deviate from the standard method and levels of unmet need from Oxford City as well as again highlighting the lack of engagement from Oxford City on strategic matters.	This was in relation to Oxford's (emerging but now withdrawn) Local Plan 2040. There are no direct implications for our plan, although touches on matters relating to unmet need from Oxford.	This consultation response presents the planning arguments, as well as the S&V view of Oxford’s engagement activities following the numerous attempts made by S&V to seek resolutions.

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		See Consultation Response (Vale of White Horse) - Doc C in Appendix 4 (LPA02.4)	<p>Method, and whether there are exceptional circumstances to justify the departure. S&V also highlighted the lack of engagement with S&V to identify an alternative methodology suitable for establishing an alternative housing need figure.</p> <p>S&V highlighted that we have previously raised concerns in relation to the DtC and housing need in our previous consultation representations. S&V note the meeting taking place on 27 March 2023, but that the meeting did not resolve the issues raised or identify a process for their resolution that had been acted upon since, and that there has been no subsequent active, constructive, or ongoing engagement.</p> <p>S&V raised that the submitted plan failed to meet the DtC and urged Oxford to engage with S&V on outstanding unresolved strategic matters.</p> <p>Our request S&V set out in the response is as follows: <i>'the Council is strongly urged to reconsider its approach and, even at this late stage of the plan-preparation process, to engage on an on-going, constructive, and active basis with both SODC and VOWHDC on the strategic matter of housing, and on how such needs should be identified, and to what extent there are any unmet needs, having regard to the potential to meet those needs within the Local Plan area, and on what should be done as regards any properly evidenced unmet needs'.</i></p>	S&V strongly urged Oxford City to reconsider their approach and engage with us on unresolved housing need matters.		
See relevant engagement with Oxford City Council on 22/12/2023 in Table B – Letter from Oxford to S&V formally requesting assistance to meet unmet housing need						
09/01/2024	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	076 Minutes	<p>Meeting - On a Joint Oxfordshire SOCG for Oxford's Local Plan, Oxford seeking feedback on a draft so that next OPPO can be refining a nearly final version.</p> <p>Oxford had written formally to districts on 22 December 2023 to help with unmet housing need, Oxford seeking feedback and agreed to discuss at next OPPO meeting.</p> <p>Oxford indicated at this meeting they were still intending to submit their Local Plan by the end of March 2024.</p> <p>Key extract from the minutes regarding SoCG progression: 'RW (Oxford) - The plan had been to collate everyone's answers to CH's questions on the previous version to inform this item but only EB (S&V) responded yesterday.'</p>	No points of disagreement	On housing, the engagement helped discuss specialist housing need evidence, with two studies underway (OCC's and JHNA). On housing, discussions on unmet need helped inform JLP housing policy HOU1.	<p>These minutes demonstrate that S&V had continued to be actively engaged on the preparation of the draft Oxfordshire-wide SoCG.</p> <p>The minutes include an update on Local Plans, when it became clear that Oxford had decided to continue to submit their Local Plan for examination. Their Reg 19 had closed on 5 January, 4 days prior to Oxford explaining this to the OPPO group.</p>

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10/01/2024	Public consultation including all statutory bodies and neighbouring local authorities	077 Consultation notifications	JLP Consultation - Preferred Options Consultation Regulation 18 Part 2 - Public Consultation.	For a summary of the comments made and S&V's response please refer to the Regulation 18 Part 2 Preferred Options Consultation Statement and appendices (examination library references LLP07.2 and LPP07.1)	Feedback from this consultation informed refinement of JLP core documents, supporting evidence and topic papers for the Regulation 19 Publication Period.	A formal stage of engagement in the JLP local plan.
See relevant engagement with Oxford City Council on 19/01/2024 in Table B – S&V's response to Oxford's formal request to assist with unmet housing need						
See relevant engagement with OPPO on 07/02/2024 in Table B – Minutes showing Oxford would submit despite lack of resolution and engagement on SoCG						
See relevant engagement with Cherwell District Council on 07/03/2024 in Table B – Notes showing discussions about JLP and Cherwell Local Plan's positions on DtC including housing need with resolutions						
08/03/2024	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	082 Minutes	Meeting - Good progress reported on preparing SOCG for signing in time for submission of Oxford's Local Plan planned for end March 2024.	S&V working with Oxford City on a bilateral SOCG for the Oxford Local Plan.		These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG, including a bilateral SoCG as well as the Oxfordshire-wide SoCG.
16/04/2024	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	087 Minutes	Meeting - Update on local plans included that Oxford City had submitted their local plan for examination	Areas of agreement and disagreement were set out in a Joint Oxfordshire SOCG (agreed by all Oxfordshire Councils) and a bilateral SOCG between South, Vale and Oxford City, which were completed in time to accompany the submission of Oxford's Local Plan at the end of March 2024.		These minutes confirm that S&V had continued to engage actively with the preparation and signing of draft SoCGs to meet Oxford's submission deadline.
See relevant engagement with Oxford City Council on 10/06/2024 in Table B – Engagement with Oxford Local Plan hearings						
See relevant engagement with Oxford City Council on 18/06/2024 in Table B – OPPO Meeting discussing Oxford Local Plan examination outcomes						
See relevant engagement with OPPO on 17/07/2024 in Table B – Minutes about JLP timing and news on timing of Oxford's first stage hearing conclusions						
15/08/2024	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	100 Minutes	Meeting - S&V accelerating JLP timetable planning to hold Regulation 19 consultation in October and submit in December 2024. Sharing of press release regarding response to new NPPF. Discussion about Oxford sewerage treatment infrastructure delays, and potential impacts on trajectories on sites and unmet need sites within its catchment. S&V to start reaching out to other authorities on preparing SOCG for the JLP.			The minutes make clear that the outcome of the first stage hearings remained outstanding, and the S&V and Cherwell approvals of their Local Plans would remain timed after the outcome of the unresolved housing need matters from Oxford. These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.
12/09/2024	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire,	102 Minutes	Meeting - S&V shared a first draft of an Oxfordshire SoCG to other authorities for the JLP.	Agreement to continue to work toward a joint SOCG for S&V JLP		These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.

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	Oxfordshire County Council, Arc4 Consultancy		Oxford indicated the position with their Local Plan was the same as the previous meeting (although it was subsequently seen that the date of the letter from PINS with the initial conclusions was the day prior to this OPPO meeting).			
See relevant engagement with Oxford City Council on 27/09/2024 in Table B – Oxford Local Plan Inspectors' letter and Oxford's letter challenging the outcome						
01/10/2024	Public consultation including all statutory bodies and neighbouring local authorities	106 Consultation notifications	JLP Consultation - Publication Period Regulation 19 - Public Consultation	For a summary of the comments made and S&V's response please refer to the Regulation 22 Consultation Statement and appendices (examination library references CSD10 and CSD10.1)	Opportunity for the comments raised to feed into proposed modifications (CSD01.1)	A formal publication stage of the JLP local plan and an opportunity for representations from the other authorities.
10/10/2024	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	108 Minutes	Meeting - Oxford confirmed that they had received the letter from the Inspectors and that there is no other news as of yet. The progression of the SoCG is discussed as well as alignment of that with each Councils Reg 19 responses to the JLP.	Continues agreement to work towards a joint SOCG for S&V JLP, and to feed in forthcoming points raised in any Reg 19 representations from authorities.		These minutes demonstrate that Oxford were not able or willing to share more about their likely next steps whilst they were awaiting a response to their challenge to PINS. These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.
15/10/2024	Cherwell District Council	109 Minutes	Meeting - both parties provided an update on their local plans. Officers discussed Cherwell's responses to the previous JLP Regulation 18 consultations and actions taken in response. The conversation included the role of meetings to resolve issues like OPPO and FOP (and confirmed we both send attendees to the FOP sub-groups). Both parties had heard a call for those FOP meetings to work better to support on planning matters, but have not heard that there is an actual call for/potential for those to be reviewed. Heads of Planning meetings raised but S&V structures means it's not the best forum for plan-making matters. S&V Planning Policy Manager attends HoP occasionally but the last meeting was challenging and S&V are wanting to give Oxford the space to come to their conclusions about next steps regarding their Local Plan Inspectors' report conclusions. Key extracts from these minutes: 1. <i>'The approach to housing figures has been to move away from HENA, except with regards to Specialist Housing Need, rollback on the</i>	Both parties agreed that there needs to be an indication from Oxford about their next steps. Both parties agreed on the importance of ongoing discussions on various strategic matters. Cherwell maintained that the issue of an appropriate balance between housing and employment should be ensured and will likely be raised in the Regulation 19 response, however S&V clarified that since Regulation 18 stage our ELNA and JHNA consultants have engaged and reported contentment to S&V with the appropriate balance being struck. Both parties agreed it was important to maintain sites for Oxford unmet need. The meeting overall offered an opportunity to discuss each party's outstanding key strategic matters with the respective plans, but both parties	The Cherwell engagement has led to S&V coordinating its plan between the ELNA and HNA consultants.	These bilateral meeting minutes discuss Oxford unmet need, so this is a relevant engagement to reflect upon. Key extracts from the minutes (1, 2, 4 and 5) demonstrate that there was a shared view between S&V and Cherwell that the Oxford Inspectors' letter (See Table B entry of 27/09/2024, located within examination library reference LNP05) had provided some resolution to the matters related to the HENA evidence, as well as many points of alignment between S&V and Cherwell approaches to dealing with Oxford unmet need and new unmet need. The key extract 3 from the minutes demonstrate that S&V and Cherwell were reflecting on the lack of willingness of Oxford to provide information about the next steps for their plan at the 10 October 2024 OPPO. These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.

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			<p><i>previous evidence base, using the current Standard Method Numbers and like S&V are adding Oxford City's agreed unmet needs of 4,400 units.'</i></p> <p>2. <i>'All the sites allocated to meet the City's unmet needs are being rolled forward.'</i></p> <p>3. <i>'Oxford City's response to the Inspector and their next steps were speculated on, as it was queried what the potential implications may be for both Plans going forward, but both agreed we need to know what Oxford intend to do next.'</i></p> <p>4. <i>'S&V raised previous that a housing need approach based on HENA would bring significant challenge to S&V, which although CDC has previously clarified was not the intention, in reality this challenged has happened with many in the development industry seeking to use the HENA figures for S&V to undermine the JLP. Both agree that by not following the HENA approach, this would resolve this issue of dispute.'</i></p> <p>5. <i>'CDC clarified that the approach to be taken is the Standard Method plus unmet needs as the practical approach.'</i></p>	<p>expressed that concerns had largely fallen away.</p> <p>Both parties agreed that engagement on the SOCG should continue and S&V expressed the importance of informal relationships and offer informal chats about policy matters.</p>		
07/11/2024	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	115 Minutes	<p>Meeting –</p> <p>Key extract from the minutes from Oxford about their Local Plan: 'Not much has changed externally and haven't yet received any response from the Inspector to the Council's letter. RW is planning on getting a report to cabinet and council with a plan of action in January.'</p> <p>SoCG related to the JLP was discussed.</p>	Agreement to continue to work toward a joint SOCG for S&V JLP.		<p>These minutes demonstrate that Oxford were not able or willing to share more about their likely next steps whilst they were awaiting a response to their challenge to PINS. This was the second OPPO meeting since the initial conclusions were published without any discussion about the next steps for Oxford.</p> <p>These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.</p>
12/11/2024	Oxford City Council	See Oxford City Council Reg 19 Consultation responses	Oxford submit Reg.19 representations on JLP.			A formal stage of engagement on the JLP.
See relevant engagement with Oxford City Council on 20/11/2024 in Table B – Oxford local Plan Inspectors' final letter in reply to Oxford's challenge						
26/11/2024	Oxford City Council	See DtC statement at CSD09.1, Appendix 2	<p>Within days of the second Inspectors' letter to Oxford being published, S&V write to Oxford requesting information on what Oxford will do with OLP and asking for any information on identifying housing need.</p> <p>Key extracts from the letter:</p>	The first key extract from this letter shows that Oxford had not raised concerns about the Duty to Co-operate during JLP plan preparation.		Key extracts 2, 4, 5, 6 and 7 from this letter demonstrate that S&V, having reflected on the outcome of the Oxford examination, enquired of Oxford what they were intending to do next, and how unmet need may be dealt with. This was

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			<p>1. <i>'I refer to the representations dated 12 November 2024 that Oxford City Council (Oxford) submitted to the Proposed Submission version of the Joint Local Plan 2041 (the JLP). As I expect you know, those representations seek to suggest that there has been non-compliance by South Oxfordshire and Vale of White Horse District Councils (the Councils) with the legal duty to co-operate in the preparation of the JLP. That contention is not accepted by the Councils and it is disappointing that Oxford has seen fit to make such a suggestion for the first time at such a late stage in the preparation of the JLP, noting that no such claim was made in Oxford's earlier consultation responses or in the successive Oxfordshire Planning Policy Officers group (OPPO) meetings, where there has been considerable opportunity for raising this.'</i></p> <p>2. <i>'the purpose of this letter is to seek to understand what Oxford now intends to do in relation to its own Oxford Local Plan 2040 (the OLP) and future plan-making for its area, having regard to the most recent letter from the OLP examining Inspectors, dated 20 November 2024.'</i></p> <p>3. <i>'Notwithstanding that clearly expressed concern about the duty to co-operate (which echoes the point made in our letter dated 17 March 2023 in response to the Regulation 18 consultation on the OLP) and that explicit request for engagement on a more appropriate and productive way forward, Oxford proceeded to submit the OLP shortly thereafter and there was no such engagement on any alternative approach to the matters where it was apparent that Oxford and the Councils were not in agreement. Those disagreements were therefore, regrettably, played out in front of the OLP examining Inspectors, with the results that we have seen, as expressed in their letters dated 11 September 2024 and 20 November 2024. Those letters confirm that the Councils were justified in the concerns they raised and that there was a failure of the duty to cooperate by Oxford in the preparation of the OLP. I make these points not for the purpose of vindication of the Councils' actions but to highlight that the outcome was one that the Councils sought to avoid so far as they reasonably could.'</i></p>	This was an unexpected change in view.		to ensure that we were as constructive as we could be in the discussions about unmet need prior to the JLP submission.

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			<p>4. <i>‘That then leads us to the position of what Oxford will do now. The letter dated 20 November 2024 presents Oxford with a choice in terms of procedural routes to be followed, but they both lead to the same result, namely that the OLP will not proceed to become an adopted local plan.’</i></p> <p>5. <i>‘In addition, on the reasonable assumption that the OLP will not now progress further, I would be grateful if you can inform me what steps Oxford will be invited to take as regards future plan-making and the timetable for that.’</i></p> <p>6. <i>‘Notwithstanding the earlier disagreements between Oxford and the Councils on how to assess and meet needs, which were ventilated at the OLP examination, I assume that, for a whole variety of reasons (not least the Inspectors’ findings and the proposed new National Planning Policy Framework), Oxford will be starting afresh in how it seeks to identify the needs that should be met by any new local plan and that, at present, no work has been done in that regard. I would be grateful if you could confirm this assumption or, if not, share any work that Oxford has undertaken to quantify its needs and how they are to be met.’</i></p> <p>7. <i>‘I ask these questions because, as you are aware, the Councils are working to submit the JLP for examination before Christmas 2024, and it would be helpful to understand the latest position with the OLP and any replacement for it before they do so.’</i></p>			
28/11/2024	Oxford City Council	119 Minutes	<p>Meeting - This bilateral meeting was arranged to discuss Oxford's Regulation 19 representations, and specifically anything raised as a potential strategic matter, so S&V officers could explore the potential issue and effects that Oxford claim.</p> <p>The following matters were discussed:</p> <ul style="list-style-type: none"> • Employment need and supply, and its relationship with housing requirements. The meeting discussed the balance between employment and housing, the potential impact of the intended supply of employment on Oxford and on infrastructure and commuting rates, when the employment evidence was shared at different stages, Oxford's assumptions about jobs and delivery within their representation, misrepresentations within Oxford's representation about supply delivery dates and new allocations. 	<p>There remained a disagreement about the intent of the JLP, with Oxford expressing that the JLP employment strategy could be harmful but S&V contested this saying that the new allocations are not significant and assumptions made about delivery and jobs numbers are not accurate. S&V also commented that the employment/housing balance has been explored by its Employment Land Needs Assessment (ELNA) and Joint Housing Needs Assessment (JHNA) consultants.</p> <p>It was agreed that continued engagement would include the preparation of a SOCG and need for</p>	<p>The meeting was held post Regulation 19 stage so did not impact on plan policy. The S&V ELNA consultants have been engaged to review the assumptions and claims made by Oxford, and initially conclude that there are no changes required to the ELNA.</p>	<p>These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.</p> <p>The key extracts 1-5 demonstrate that although S&V attempted to explain that we hadn't changed anything about the JLP approach to identifying existing unmet need, Oxford had not come to the meeting to resolve the matter, and did not expect us to change our approach.</p>

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			<ul style="list-style-type: none"> Housing need and annualised housing requirements. Standard method and alternative methods. Delivery of housing supply. <p>We agreed to continued engagement and to prepare a SOCG.</p> <p>Key extracts from the minutes:</p> <ol style="list-style-type: none"> S&V – ‘advised that the JLP uses the same approach that has been used previously in adopted plans...Vale’s adopted Local Plan Part 2 provides for delivering unmet need between 2019 and 2031. When Vale adopted the plan, this allocated additional housing in the Abingdon and Oxford Fringe Sub-Area, but that this was not specifically ringfenced as the delivery of Oxford’s unmet need.’ Oxford – ‘those 2 years of need have been taken off the housing requirement in the JLP, and although S&V are stating that it has been completed from a point of view of Vale’s overall numbers, OC consider that the delivery of Oxford’s unmet need, including affordable housing, has not been evidenced.’ S&V – ‘have never specified and ringfenced sites that aim to deliver unmet need...with market housing there is no way of controlling who from Oxford is going to move into specific sites, hence why unmet need is instead calculated as part of a housing requirement and addressed throughout the district...explained that with sites in both plans, which are geographically close to Oxford, there is no requirement in national policy or in set out in the current adopted plans that specify which homes are to be provided as unmet need. However, nomination rights for the affordable element (50%) are separate. S&V acknowledge that we signed memoranda of understanding on nomination rights on specific sites allocated in the local plans.’ S&V – ‘advised that the JLP approach aligns with other plans that address unmet need at other councils, for example, Luton and Central Bedfordshire had a similar disagreement, and the conclusion from the Inspector’s report clarifies that the same approach taken by the JLP is a sound approach.’ Oxford ‘confirmed that Oxford is not realistically expecting a change of position by 	ongoing discussions about the ELNA assumptions would help to resolve the issue of job number assumptions. There were no other areas of resolution related to this matter.		

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			<i>South and Vale on any matter at this meeting as S&V's plan is being submitted next week.'</i>			
02/12/2024	Oxford City Council	See letter in Appendix 3 of CSD09.1	<p>Oxford reply to South and Vale's letter seeking clarity about next steps, to understand how to deal with new unmet need given the status of Oxford Local Plan.</p> <p>Key extracts from the letter: <i>'With regards to the OLP2040, in January officers will take a report to a meeting of our full Council for a decision on how to proceed, which will be accompanied by a draft Local Development Scheme (including associated timetable). We have spent the last several months proactively working through next steps, taking legal advice, reviewing options and assessing risks, as I am sure you would expect. We have also taken the opportunity to set out our genuine and significant concerns with the Inspector's conclusions and recommendations. This was done not with any expectation that the decision would be overturned, but instead with the aim of seeking some additional clarity. I'm sure you will have noted that the most recent response to us from the Planning Inspectorate did not address or engage with any of these concerns or indeed add any further clarity. In due course, we will be in touch on ongoing Duty to Cooperate matters arising from any next steps we take in respect of a Local Plan for Oxford. Until the papers are published as part of our democratic process it would be improper to confirm the details of the approach to be recommended outside of that process'.</i></p>			It is demonstrated in the key extract to this letter, that very little information would be provided by Oxford to S&V prior to submission of the JLP in terms of how Oxford would respond to the next steps of their Plan and unmet need. We had asked and taken that engagement as far as we could prior to our submission, given Oxford had not formed a position on unmet need, or at least had not communicated one.
05/12/2024	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	122 Minutes	Meeting - Final tweaks to the Joint Oxfordshire SoCG were discussed, and an update on bilateral SOCGs, with Cherwell's at draft stage and West and Oxford to follow. The joint Oxfordshire SOCG was also nearing signing stage.	None recorded.	Joint SOCG almost ready.	These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.
06/12/2024	Oxfordshire district councils	See SoCG examination library reference DUC02	Statement - Joint Oxfordshire SOCG between Cherwell District Council, Oxford City Council, South Oxfordshire District Council, Vale of White Horse District Council and West Oxfordshire District Council	Please see examination library reference DUC02	None	This signing of the Joint SoCG by all parties demonstrate that S&V had continued to actively engage with neighbouring authorities right up to the submission date of the JLP (9 December 2024).
09/12/2024	Oxford City Council	127 Email	Emails - This was an email chain between officers from S&V and Oxford City Council.	Oxford stated that their position on the S&V Plan (including on unmet need) is unchanged from our submitted representations.	None	The email demonstrates that Cherwell presented a resolution in their DtC statement that there was an agreement with Oxford about there being no new

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			<p>On 5 December 2024 S&V asked Oxford about Cherwell's reference in their interim Duty to Co-operate Statement to Oxford and Cherwell's meeting and agreement to unmet need. The Cherwell statement says Oxford agreed with Cherwell's use of agreed unmet need, but this conflicted with Oxford's position on the JLP. S&V asked if the same approach agreed with Cherwell would now apply to S&V:</p> <p><i>"I've been skimming through the Cherwell Interim Statement of Common Ground Appendix 6 - Interim Regulation J 9 Duty to Cooperate statement pdf. Paragraph 4.13 says "Under either scenario above there is housing need to meet for Oxford, and we are continuing with our commitment to meet the identified need for 4,400 homes previously agreed by retaining relevant Local Plan policies. We do not, however, consider that we need to accommodate additional housing need for Oxford in this Local Plan. At a meeting on 15th October 2024, under the Duty to Cooperate, Cherwell and Oxford City Council reached an understanding that the 4,400 dwellings would be brought forward to meet unmet need. No additional accommodation was requested at that meeting." Would you be able to confirm the same applies elsewhere including South and Vale e.g. that nothing new is requested at this stage?"</i></p> <p>Oxford replied on 9 December 2024 not agreeing this: <i>"Our position on the South and Vale Plan (including on unmet need) is unchanged from our submitted representations."</i></p>			<p>unmet need to plan for, beyond what was in Oxford's adopted Local Plan.</p> <p>This email S&V attempted to get this resolution, and we asked Oxford about their position on new unmet need and whether it had changed since they wrote their Reg 19 responses to S&Vs JLP. The response does not offer that agreement and resolution. It is our view that this was not constructive because of the inconsistency of the approach. Oxford's response to us appeared to suggest that Oxford may be challenging Cherwell on that apparent agreement, and we took a judgement that this discussion between Oxford and Cherwell may need to continue, and it was clear to us that Oxford were unwilling to resolve their challenge to how the JLP deals with unmet housing need. Note that Cherwell have continued this approach as they progress their Local Plan to submission in June 2025.</p>
14/01/2025	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	128 Minutes	Meeting - S&V advised that they had submitted the JLP for examination on 9 December. Oxford confirmed that a report will be going through scrutiny, cabinet and council, confirming that City would like to withdraw their local plan.	No points of disagreement	No direct impact on the JLP policies	Continuing to update neighbouring authorities and share information

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21/04/2021	OPPO (S&V Chair), Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	001 Minutes	Meeting - In this meeting South and Vale (S&V) confirmed the decision in March 2021 by Full Councils to prepare a Joint Local Plan for S&V and set out initial steps underway on governance structures and working arrangements. OPPO discussed how alignment with Oxfordshire Plan was ideal, and also alignment of end dates for the plan periods. There was a discussion about Oxfordshire Growth Needs Assessment (OGNA) and the 'bookends' (approach to lowest and highest housing numbers to consider). S&V and Cherwell raised queries about looking beyond the standard method.	No points of disagreement Agreement on alignment of plan periods between Oxford and S&V	Introduced Oxfordshire partners to the beginning of the JLP. Meeting helped to ensure everyone progressed to make sure they aligned with the Oxfordshire Plan (being prepared at that time) and end dates aligned. The discussion on housing numbers for the Oxfordshire Plan 2050 helped identify pros and cons of different approaches. The discussion on the Oxfordshire Plan 2050 included discussions on countywide policy approaches for: energy, sustainable design and construction, water efficiency, flood risk, nature recovery, healthy place making, electric vehicle charging, and strategic environmental allocations. Furthermore, the discussion on OGNA's "bookends" (the approach to setting the lowest and highest parameters for testing growth) is specifically relevant to the JLP, as at this time, the housing requirement for the JLP was to be set by the Oxfordshire Plan 2050.	The engagement demonstrates constructive early-stage discussions about local plans in Oxfordshire and agreement on aligning plan periods between Oxford and S&V.
16/06/2021	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	002 Minutes	Meeting - S&V informed other authorities of progress towards a Joint Statement of Community Involvement (SCI) and governance arrangements for the commencement of the JLP. At this meeting all authorities agreed to start collective work on a Joint Housing and Economic Land Availability Assessment (HELAA) Working Group The Oxfordshire Plan team gave an update on the upcoming regulation 18 part 2 consultation, including a	No points of disagreement	Collective agreement on the Joint HELAA methodology which was developed in the following months. This informed the methodology for the S&V HELAA and all Oxfordshire authorities preparing plan have aligned to the Joint HELAA methodology agreements. The discussion on OGNA, and whether to include it as	The engagement resulted in an effective collective agreement and a joint HEELA methodology report. All Oxfordshire authorities producing local plans have aligned their individual HELAA approaches to this joint methodology, which is helpful to have more productive capacity discussions, especially at Oxford who have previously exported unmet housing need because of capacity constraints.

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			question of whether to publish the OGNA as part of the consultation. OPPO agreed to publish the OGNA for comment as part of that consultation.		part of the public consultation is specifically relevant to the JLP. At this time, the housing requirement for the JLP was to be set by OxPlan 2050.	
11/08/2021	OPPO (West Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	003 Minutes	<p>Meeting - Discussion on housing land supply with an offer from S&V to create a template to help all authorities to collect and share information on housing lead-in times and build-in rates to help inform these in Oxfordshire.</p> <p>The Oxfordshire Plan team informed that the Regulation 18 Part 2 consultation was underway.</p>	No points of disagreement	<p>Sharing information on lead-in times and build out rates was an idea to help inform housing supply numbers by using our own (S&V) averages and supplementing with additional information from other neighbouring districts.</p> <p>The ongoing consultation on the OxPlan is specifically relevant to the JLP. At this time, the housing requirement for the JLP was to be set by OxPlan 2050.</p>	This engagement demonstrated how S&V took a positive and collaborative approach to shared challenges in Oxfordshire like housing monitoring, with an offer of forming practical solutions to help us all progress our evidence gathering.
20/08/2021	OPPO (West Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	004 Email	Email - Following discussion at the 11 August OPPO on the next stages of Oxfordshire Plan 2050, S&V sent an email proposing a template for collation of data of housing lead-in times and build out rates. This was in relation to initial OGNA work including implications for the Districts' five year housing land supply calculations. S&V highlighted the urgency for coming to an agreement on housing requirement figures. Issue to be addressed by Heads of Planning in context of work needed to follow the OGNA.	No points of disagreement	Sharing of information on housing delivery and approaches to supply	As row above, this engagement demonstrated how S&V took a positive collaborative approach to shared challenges in Oxfordshire like housing monitoring, with S&V following through the discussion at OPPO by circulating a template to help us all progress our evidence gathering.
20/10/2021	OPPO (West Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	005 Minutes	<p>Meeting - All districts provided a brief overview and written update of key plan progress, including the spatial strategy, impact of the OGNA on 5YHLS and affordable housing. Presentation on community led housing delivery across the county. Discussion on housing delivery including consistent data back to 2011 as well as aligned forward trajectory figures in Oxfordshire. There was discussion about potential coordination of Local Plan evidence base, which was agreed would help alignment across Oxfordshire and achieve money savings. An action was taken away for all Districts to convene in November 2021 to discuss their recent commissions. Discussion on need to update IDPs which would be held at the November 2021 meeting. S&V flagged the urgency of coming to an agreement on housing requirement in relation to work on the OGNA, and this was agreed to be discussed at HoP meeting.</p>	No points of disagreement	<p>Helped clarify the list and timetable for preparation of studies at the Oxfordshire Plan 2050 scale and pave the way for joint local plan commissions e.g. GTAA.</p> <p>It was also a meeting where all Oxfordshire partners were aligned on housing delivery (past and future).</p>	<p>This engagement shows the degree of alignment on housing delivery (both past and future), with no points of disagreement noted.</p> <p>It is S&V productively engaging by pressing for the need for agreements being need about housing requirements following early OGNA work.</p>

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30/11/2021	OPPO (West Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	006 Agenda and Minutes	Meeting - Meeting to discuss on potential joint commissions or alignment of evidence base - local plans and Oxfordshire Plan 2050. This follows the meeting of 20/10/2021 which set the scope for this meeting. In relation to housing, the potential for joint local housing need assessments and land availability / capacity was discussed.	No points of disagreement	Helped clarify the list and timetable for preparation of studies at the Oxfordshire Plan 2050 scale and pave the way for joint local plan commissions e.g. GTAA	This meeting is a demonstration of the alignment sought in the interest of presenting a well-coordinated approach to plan making at strategic and local scales. The discussion on OGNA and the specialist housing need update to consider affordable housing needs is directly relevant to how the JLP was dealing with these matters at the time.
15/12/2021	OPPO (West Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	007 Minutes	Meeting - The Oxfordshire Plan 2050 lead raised the potential need for a further focussed Oxfordshire Plan consultation particularly on the spatial strategy as too big a leap to Reg 19. Implications for delays to local plan timetables discussed. Discussion on whether Oxfordshire Plan 2050 included too many policies. There was also some discussion about the inter-relationship with District level SHLAA/HELAA type assessments and site option assessment work for the Oxfordshire Plan 2050. Scope for aligning evidence base reports between the Oxfordshire Plan 2050 and local plans, and between local plan on cross-boundary issues was discussed, with an action for the Oxfordshire Plan 2050 lead to prepare a brief note. There was also some discussion about the process ahead to translate the OGNA recommendations into a housing need figure.	No points of disagreement	Helped clarify the clearer distinction needed between the Oxfordshire Plan 2050 and local plans. Helped shape plans for where evidence base could be joint/ shared.	This meeting is a demonstration of the alignment sought in the interest of presenting a well-coordinated approach to plan making at strategic and local scales. The discussion on how OGNA outputs could be translated into housing requirements for each local plan is directly relevant to how the JLP would have set its housing need and requirement in the context of the Oxfordshire Plan.
16/02/2022	OPPO (West Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	010 Agenda and Minutes	Meeting - Included general update on Oxfordshire Plan 2050 progress and further evidence on housing need for that plan. Each LPA provided an update on their own local plan progress.	No points of disagreement	No direct impact on the JLP policies	This meeting demonstrates the alignment on evidence commission on housing need.
06/04/2022	OPPO (West Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	012 Agenda and Minutes	Meeting -The main item was Oxfordshire Plan with an update from the Oxfordshire Plan 2050 lead about a 6 step process including a Member Workshop to be independently facilitated for agreeing key aspects on the Oxfordshire Plan including the housing requirement. Discussion around details of the Oxfordshire Plan 2050 evidence base including the OGNA, with a request for feedback on the draft OGNA methodology. There was also discussion about the Oxfordshire Plan 2050 budget not being sufficient, and a call for the councils to cover costs between them, which raised concerns from Oxford City. Agreed that more regular Oxfordshire Plan 2050 specific meetings of the policy managers would be beneficial e.g. every other week to augment the cycle of OPPO meetings.	Tensions emerging on OGNA methodology, with plans to resolve through written feedback and a 6 step process, escalation to HoP and agreement to more frequent OPPO meetings. It was agreed by all to monitor progress. There was a later (July 2022) 7 step process to securing consensus on the Oxfordshire Plan 2050 developed for the HoP group.	Oxfordshire Plan 2050 to agree the housing requirement at this time (this later changed when Oxfordshire Plan 2050 ceased, and this came within remit of JLP)	This meeting records that there was a recognised difference of views regarding the OGNA methodology, and that we collectively put plans in place to enable the more intensive discussions required to resolve the matter.

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12/05/2022	Public consultation including all statutory bodies and neighbouring local authorities	015 Consultation notification	Consultation – This is the JLP Issues Consultation Regulation 18 Part 1 - Public Consultation. Please see Joint Local Plan (examination library reference LPP08) (examination library reference LPP08.1)	For a summary of the comments made and S&V's response please refer to the Regulation 18 Part 1 Issues Consultation Result (examination library reference LLP14)	Feedback from this consultation informed preferred options and alternatives as part of Regulation 18 Part 2 Public Consultation	Statutory bodies, including those covered by the Duty to Cooperate, were invited to make comments on the consultation.
20/05/2022	All statutory bodies and nearby local authorities	017 Email	Email - Email sent to statutory bodies and local authorities providing details on how they can engage with the following documents as part of the JLP Regulation 18 Part 1 consultation: <ul style="list-style-type: none"> • Duty to Co-operate Scoping Document • Sustainability Appraisal (SA) Screening and • Scoping Report • Habitats Regulations Assessment (HRA) • Scoping Report Retail and Town Centres Study	N/A	Feedback to the Regulation Part 1 JLP Issues Consultation informed preferred options and alternatives as part of Regulation 18 Part 2 Public Consultation	Statutory bodies, including those covered by the Duty to Cooperate, were invited to make comments on the consultation.
08/07/2022	HoP (S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council)	020 Agenda and Notes	Meeting - Discussion about a 7-step process to securing consensus on the Oxfordshire Plan 2050.	No points of disagreement	Oxfordshire Plan 2050 to agree the housing requirement at this time (this later changed when Oxfordshire Plan 2050 ceased and this came within remit of JLP)	This engagement and paper demonstrated that we had an agreed resolution process to resolve differences, including on housing needs and requirements, ranging through from officers up to chief executive and councillor level. This approach was focussed on agreements and shared views about how to progress.
28/07/2022	Oxfordshire Plan team, S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	022 Email	Email - South emailed comments and an attached note from S&V on the OGNA draft methodology, expressing significant concerns. Identical email sent from Vale. Key extracts from this email: <i>'We still have some fundamental concerns with the approach proposed by the OGNA consultants. We have been clear since the drafting of the brief that we expect total transparency from the consultants, which states: "It is anticipated that the updated report will follow the fundamental main approach in the initial report but only after a review of the data, assumptions and methodologies used for the initial report ... It will update and provide further background employment information at the County and district level including providing further detail and updates where needed on the assumptions and methodologies behind the economic forecasts and growth scenarios." (Paragraph 3.1) We believe these inputs and assumptions are fundamental to the methodology. It is important that the consultants do not present outcomes before we understand, and agree, what inputs go into the model for each scenario. We have given specific</i>	There was disagreement about the methodology for the housing need evidence being prepared for the Oxfordshire Plan (the OGNA) between the authorities. A number of technical points remained at issue, including a lack of transparency behind scenarios being proposed. A workshop between the authorities the following week, attended by the Leaders and Chief Executives, led to the issuing of the joint statement about cessation of work on the Oxfordshire Plan 2050 on 3 August 2022.	After work on the Oxfordshire Plan 2050 ended, housing numbers was added to the scope of the JLP, and S&V commissioned a Joint Housing Needs Assessment covering S&V.	This email demonstrates our attempts to press partners for resolutions and answers about the OGNA methodological concerns (the lack of transparency or 'black box' approach from the consultants which we referred to at the hearings) which were not being addressed (and which later translated through to the Oxford and Cherwell HENA). The technical points S&V raised in the accompanying note go to the heart of key assumptions and methodological approaches to calculating housing need.

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			<i>comments on where we are concerned about this on the attached. Unfortunately we don't think the methodology responds to our previous comments and the brief. I appreciate this is frustrating, but we have been asking for this information since the brief was drafted, and have been asking the consultants for this information for several weeks now.'</i>			
03/08/2022	S&V, Oxford City, Cherwell, West Oxfordshire	023 Press Release	Press Release - The five councils issued a joint statement following a workshop between the authorities, announcing, with regret, the end of work on the Oxfordshire Plan 2050.	The councils agreed that they were unable to reach agreement on the approach to planning for future housing needs within the framework of the Oxfordshire Plan. The Oxfordshire Plan 2050 work programme ended and planning transitioned to a process focussed on Local Plans. The Councils committed to cooperate with each other and with other key bodies as they prepared their Local Plans	Agreement that the issues of housing needs would now be addressed through individual local plans for the City and each of the Districts. Housing numbers and other strategic matters were brought into to the scope of the JLP.	
09/09/2022	HoP (S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council)	027 Agenda and Notes	Meeting - discussed an initial draft RAG (red amber green) exercise on which of the Oxfordshire Plan 2050 evidence base studies should be continued as joint pieces of work or stopped. Of particular note is the OGNA which is recorded as red with the note "OGNA Current contract with Icenl & Cambridge Econometrics to be ceased, but need to work together on housing need as Local Plans need to progress."	No points of disagreement, <i>although it is noted that this is the first time it was known by S&V and West Oxfordshire that Oxford and Cherwell commissioned the HENA, without inviting to join that commission.</i>	Scope for working jointly on evidence-base studies after the Oxfordshire Plan 2050.	<p>This engagement demonstrates that there was an agreement between Oxfordshire authorities that working together on housing needs as local plans progress was required.</p> <p>Despite this the HENA had been commissioned by Oxford and Cherwell without this joint working together.</p> <p>It was S&Vs expectation, given this meeting's agreements, that as the HENA progressed, we would get opportunities to engage.</p> <p>In light of the agreement made in this meeting, the email of 2 December 2022 (036 Email) when S&V reached out to other Oxfordshire authorities to join us on the JHNA commission demonstrated that we had resolved to fulfil the agreement to work together on housing need.</p>
09/09/2022	West Oxfordshire	028 Email	Email - An email from S&V's Policy Manager to West Oxfordshire's Policy Manager expressing surprise at the news from the HoP meeting that day (9 September 2022) that Oxford and Cherwell had commissioned Icenl (the OGNA consultants) for their evidence on housing needs, and confirming that neither Oxford nor Cherwell had invited S&V to be part of this study:	No points of disagreement	S&V later went on to commission own housing needs evidence base to support the JLP, after inviting all the other authorities to be part of it (see later entry 2 December 2022).	This email demonstrates the divergence at this point between S&V concerns and the HENA evidence for Oxford Local Plan. It shows that the decision to prepare the HENA, using the same consultants as the contested draft OGNA, was not in the control of S&V as the commission had already happened

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			<p><i>Key Extract from the email 'That was quite a bombshell at HoP this morning that City and Cherwell have commissioned Icenl to do their housing numbers evidence. Does this help your decision? Our door is still open! As an aside – I don't know about you, but they did not invite us to be part of this before commissioning it, despite the City's Cabinet paper published this week saying "A detailed assessment of the specific housing needs for Oxford will be commissioned to support the Local Plan, ideally working with as many of our neighbouring districts as possible"'. </i></p> <p>Cherwell had not mentioned it in the list of studies we might work on jointly which was sent to OPPO members two days earlier (see entry for 7 September 2022 in LPA02.1, 026 Emails).</p>			before we would rectify the disagreement about the OGNA/HENA methodology.
18/11/2022	Oxford City Council	<p>See Consultation Response (South Oxfordshire) Document A in LPA02.4</p> <p>See Consultation Response (Vale of White Horse) Document A in LPA02.4</p>	<p>Consultation Response - A response from each Council S&V to Oxford City Council's Preferred Options Consultation on the Oxford Local Plan 2040.</p> <p>S&V noted again, as we did at Oxford's Issues consultation stage, that the vision doesn't mention affordable housing, which is included in the Oxfordshire Strategic Vision.</p> <p>S&V disagreed with Oxford's assumed capacity and their inability to accommodate its needs in full.</p> <p>S&V highlighted that the true potential for housing in the city is far higher.</p> <p>S&V also stated that there were many early conclusions reached about neighbouring districts, including one regarding surrounding authorities taking unmet need. S&V explained this is premature and beyond the scope of the plan.</p> <p>S&V disagreed with Oxford City Council's assertion that that circumstances are likely to exist in Oxfordshire that justify using an alternative method to calculate housing need. S&V stated that 'Oxford City Council cannot solely make determinations about the housing need required to serve all communities through Oxfordshire' and that 'it is beyond the remit of this plan to draw conclusions for the whole county of Oxfordshire'.</p> <p>S&V also explained that the consultation document states that a piece of work will be commissioned to establish housing need, which was already commissioned before a discussion with S&V was had,</p>	<p>S&V disagreed with Oxford City Council's assertion that circumstances are likely to exist in Oxfordshire that justify using an alternative method to calculate housing need.</p> <p>Disagreement over Oxford's assumed capacity and ability to accommodate its needs in full.</p> <p>S&V noted that the commissioning of a piece of work to establish housing need was not discussed with S&V, which was not positive preparation. However, we did express that we remained open to engaging on the methodology with Oxford.</p>	<p>This was in relation to Oxford's (emerging, but now withdrawn) Local Plan 2040. There are no direct implications for our plan, but the representations were part of a dialogue of S&V engaging with Oxford on the issue of housing need, how it should be assessed, and the extent of Oxford's own capacity to meet its needs, all of which topics formed part of the context for considering housing needs during the preparation of the JLP.</p>	<p>The S&V representations raised the problems with the HENA approach, and that the Oxford Local Plan was not positively prepared.</p> <p>It is important to note that S&V urged further engagement on the methodological concerns. This demonstrates that we had continued to seek resolution and that our engagement is constructive, active and part of an ongoing narrative or reaching out to achieve get a resolution.</p>

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			noting this is not positive preparation. However, S&V expressed that 'we remain open to engaging with the City Council on the methodology.'			
02/12/2022	OPPO (Cherwell Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	036 Email	Email - S&V emailed the other Oxfordshire authorities with news that the JLP's new LDS had been approved and inviting the other authorities to join S&V in joint evidence studies, including Housing Needs Assessment and the specialist housing needs assessment. The email also asked about whether OPPO would meet again soon.	No points of disagreement	S&V starting to plan housing needs evidence base to support the JLP, inviting all the other authorities to be part of it.	This demonstrates S&V constructively reached out to others in Oxfordshire to collaborate and jointly commission housing evidence.
15/12/2022	OPPO (Cherwell Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	037 Email	Email - Email from Cherwell with action points following the OPPO meeting on 15 December 2022. Also internal note sent by S&V policy manager to S&V planning policy colleagues sharing news from OPPO: "confirmed that Oxford and Cherwell are working on a joint housing needs study, they are calling it a HENA. It's nearly there. The specialist needs element is nearly done. They will tell us more in Jan 2023." During the months September 2022 to Feb 2023, OPPO was chaired by Cherwell and there were no formal agendas or minutes during this period.	No areas of disagreement recorded, but the internal email illustrates that Cherwell and Oxford had not invited S&V to be involved in this housing needs commission, and had not shared information about its methodology or scope. The first time S&V were aware of the contents of the OGNA and that it covered the whole of Oxfordshire was when it was published three weeks later in January 2023.	S&V went on to commission own housing needs evidence base to support the JLP, inviting all the other authorities to be part of it.	This email reiterates that S&V were not engaged with by Oxford on the HENA. It shows that S&V were told that the HENA would be part of the next stage of public consultation, rather than there being any opportunity for meaningful working together. The S&V consultation responses to Oxford's Local Plan Preferred Options the month prior to this OPPO urged further engagement, and there was an offer from S&V to collaborate on the JHNA two weeks prior to this OPPO, but despite this the collaboration on housing need evidence was not being reciprocated.
06/01/2023	HoP (S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council)	039 Email	Email - A note from Oxford and Cherwell informing Heads of Planning at West and S&V that they have published the Housing and Economic Needs Assessment (HENA) produced for Cherwell and Oxford.	This was the first time S&V were shown the contents of the HENA and realised that it contained housing numbers for S&V, without the consent or involvement of S&V. This became a firm area of disagreement.	S&V contested the HENA through the Oxford Local Plan examination.	This email demonstrates that S&V were not engaged with by Oxford on the HENA until it was published with an agenda for a meeting of Cherwell's Overview and Scrutiny Committee in January 2023. These actions were taken by Oxford and Cherwell despite our repeated attempts to ask for their engagement with us, but there was no engagement with S&V by Oxford to resolve the issues before it was published.
12/01/2023	OPPO (Cherwell Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	041 Email	Meeting - OPPO agenda items included an update on FOP and housing evidence from Cherwell. Also discussion around the NPPF proposals. During the months September 2022 to Feb 2023, OPPO was chaired by Cherwell and there were no formal agendas or minutes during this period.	No points of disagreement	No direct impact on the JLP policies.	This shows that although no formal minutes were prepared, housing need was discussed. S&V considered that the imminent consultation on the HENA and Oxford's local plan housing need consultation would offer an opportunity to put some points across about the problems with the HENA approaches. We felt compelled to commission ORS to help scrutinise the HENA and set out our (as yet not responded to) concerns about

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						the HENA across in a constructive technical manner.
17/03/2023	Oxford City Council	<p>See Consultation Response (South Oxfordshire) Document B in LPA02.4</p> <p>See Consultation Response (Vale of White Horse) Document B in LPA02.4</p>	<p>Consultation Response - A S&V response to Oxford City Council's Regulation 18 stage consultation on the Oxford Local Plan Housing Need.</p> <p>In this response we expressed our disappointment that our response to Oxford's preferred options consultation hadn't resulted in a change to the way housing need was considered.</p> <p>We also noted that we had 'serious concerns' about many aspects of the Housing Need consultation, with thoughts provided on the HENA and its methodology, the lack of any exceptional circumstances to deviate from the Standard Method, the housing capacity, the chosen housing need and capacity-led requirement and also the way in which Oxfordshire housing needs and specialist housing need are being considered by the City.</p> <p>We highlighted that the consultation 'published unsubstantiated housing need evidence for other areas in Oxfordshire using consultants and methodologies that are known to be a point of discord, and without any offers of engagement'. We also noted that their Housing Need consultation document discusses some unsubstantiated exceptional circumstances for departing from the standard method.</p> <p>We reiterated the point that the HENA was commissioned as an Oxfordshire assessment without any consultation or engagement with S&V.</p> <p>We highlighted that 'we have responded to previous consultations about this lack of contact, as well as there being unsubstantiated exceptional circumstances to depart from the standard method, we must conclude that this is a failure of the duty to cooperate in your plan making process'.</p> <p>At the end of the response, we express that we would: 'be grateful to hear your thoughts on our responses, particularly as we are yet to hear how our November 2022 response is being addressed.'</p>	<p>Continued disagreement over the decision to deviate from the standard method and levels of unmet need from Oxford City, as well as highlighting the lack of engagement from Oxford City on strategic matters.</p> <p>In the concluding comments we express that we would be grateful to hear Oxford's thoughts on our responses.</p>	<p>This was in relation to Oxford's (emerging, but now withdrawn) Local Plan 2040.</p> <p>There are no direct implications for our plan, although touches on matters relating to unmet need from Oxford and engagement on strategic matters.</p>	<p>In light of the following previous content S&V reflected at this consultation:</p> <ul style="list-style-type: none"> there being no action from Oxford following our urgency to engage on the HENA methodology following Oxford's Preferred Options and out request; the lack of resolution through available OPPO meetings; the lack of willingness to work with us on resolving the methodology concerns we had raised during the closing stages of the OGNA work; the Oxfordshire wide nature of the evidence prepared by Oxford and Cherwell, without the necessary engagement given its impacts. <p>The reflection led us to the conclusion in our consultation responses that Oxford were not meeting the DtC. S&V's responses at this Reg 18 stage were clearly explaining why we had taken that view, and suggested how to resolve it. This was a constructive representation. We ended the representation asking to discuss this and our previous response on this matter.</p>
27/03/2023	Oxford City Council	044 Minutes	<p>Meeting - Officers discussed S&V's response to Oxford City's consultation on housing need. The discussion focussed on three areas - (a) points of principle and the general approach, (b) technical comments on the</p>	<p>S&V raised concerns about the HENA including S&V in the study area. S&V also explained technical concerns from our response to the consultation, including: (a) lack of exceptional</p>	<p>This was in relation to Oxford's (emerging, but now withdrawn) Local Plan 2040. There are no direct implications for our plan,</p>	<p>This meeting demonstrates discussion about S&V concerns raised at previous Reg 18 stages with varied success in terms of having constructive outcomes.</p>

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			housing need, and (c) matters relating to Oxford's unmet housing need.	<p>circumstances for departing from the SM, (b) difference between Census and HENA data, (c) job growth assumptions, and (d) capacity of Oxford City. Noted that we may need to escalate matters to senior managers if planning officers cannot reach agreement on these points.</p> <p>On housing need evidence covering Oxfordshire, there was no resolution. The meeting minutes show that Oxford and Cherwell had decided that this methodology worked best for them without a clear rationale. Oxford had decided that the HENA was going to be progressed on that Oxfordshire wide basis despite S&V not being engaged on it, and in knowledge of us raising concerns. There was no need for Oxford to present their HENA evidence in such a way that significantly impacted on South and Vale and other areas.</p> <p>On the matter of Oxford claiming that exceptional circumstances existed to go beyond the standard method and that this applied across Oxfordshire, the minutes show that it was assured to S&V (effectively we believed resolved), that Oxford would be careful not to word their Reg 19 plan in that way.</p> <p>On HENA methodology, the minutes are clear that if we had technical concerns (we had raised those already, but Oxford hadn't reviewed that detail/extent of technical challenge until consultation closed), then the HENA would be revisited.</p> <p>Paragraph 18 shows that inconsistencies in outcomes given lower jobs growth, which Oxford explicitly agreed would be investigated with the HENA consultants.</p>	although touches on matters relating to unmet need from Oxford so it was relevant to show how S&V as the authority potentially importing housing need from Oxford, had engaged on this with the exporting authority to inform the JLPs possible actions.	<p>The minutes show that there were attempts at agreeing some resolutions about the HENA methodology at that stage (in terms of there being a likely technical review with the authors of the HENA, given we had raised technical concerns and because we had assurances that Oxford would check specific anomalies with them), but this was not followed up on, as records show subsequently.</p> <p>The minutes also show that there was no resolution on an Oxfordshire wide Housing Market Assessment methodology being taken, and that was because there was no agreement about whether that approach is appropriate. There was no recognition from Oxford about the extent of the significant impacts for S&V if Oxford identified a need arising from its own area (via a disputed methodology) which it did not plan to meet within that area, and so constituted an unmet need potentially 'exported' to its neighbours. S&V explained at this meeting as clearly and actively as possible, about the way in which this significantly impacts on two or more authority areas. S&V made the same case at Oxford's local plan examination. This decision did not impact the JLP as the JLP had its own evidence on housing need, but it did impact on the potential extent of new unmet need when considered alongside the capacity of Oxford that they were proposing (at this stage their capacity was still being confirmed).</p> <p>There were also agreed resolutions about references to exceptional circumstances, which again were not followed up on.</p> <p>The minutes show there was no possible resolution at this stage on HELAA capacity concerns because that work was not yet complete.</p>

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				<p>S&V took these resolutions about the HENA at face value, as a resolution to take some action to review our technical points with the HENA consultants. We made it clear that we would much prefer to resolve this before the Oxford Local Plan examination and felt that this was a constructive way forward.</p> <p>On capacity in the city, it was confirmed that the HELAA wasn't finished. In these circumstances very little could be resolved.</p>		
19/04/2023	Wokingham Borough Council, Oxfordshire County Council, Cherwell District Council, Buckinghamshire Council, Oxford City Council, Swindon Borough Council, West Oxfordshire District Council	046 Meeting invitation and Minutes	A workshop for neighbouring and nearby local authorities hosted by S&V and consultants from Opinion Research Services (ORS) on the S&V joint Local Housing Needs Assessment. This workshop was an opportunity for other councils to understand work on the project to date and feedback with any questions or clarifications they have on the study. Specialist Housing Need Assessment Workshop provided a presentation on S&V approach to using the Standard Method as our housing need, and setting out the methodology of the specialist housing needs assessment with a Q&A, including a discussion on provisions for elderly, students, capacity to meet unmet need. <i>Oxford expressly sought confirmation that the specialist needs were derived from as assessment based on the Standard Method, and this was confirmed by S&V.</i>	ORS using new data resulting in difference of figures than Oxford City & Cherwell HENA that <i>had been</i> prepared (and disputed by S&V) at that time.	Discussion on new unmet need <i>is required</i> to continue and if necessary through Oxford's examination. It was agreed that an integrated approach will be taken once an ELNA for S&V has been prepared to ensure an appropriate relationship between job and housing growth for the districts - something which is now in dispute. The workshop with other authorities helped share thinking and provide an opportunity for feedback at the start of the process of preparing the S&V JHNA.	Holding a workshop to convene all neighbouring authorities shows S&V reaching out to engage constructively and at an early stage on housing needs evidence for the JLP. Also we were actively and constructively engaging through this workshop as we had recorded and responded to the request from Cherwell that job and homes balance was suggested to be aligned.
26/04/2023	OPPO (Cherwell Chair) S&V, Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	047 Agenda and Minutes	<p>Meeting</p> <p><i>Key extract from minutes from the update from Oxford: 'Still going through responses to the second Regulation 18 consultation on housing. Working on HELAA to get up to date and ready to go. Aiming for Reg 19 in November/December subject to committee approval end of Summer. Reg 18 was preferred options rather than draft Plan. Consultation dates will be ahead of CDC. Thinking of doing a partial review of CIL schedule as only had inflation increases since it was introduced.'</i></p>	No points of disagreement	Progress on GTAA procurement helped move the process of commissioning a joint study moving forward.	These minutes show that Oxford had still not reviewed their responses to the Reg 18 housing need consultation and that the capacity work was still unfinished. Nothing significant had therefore progressed in terms of actioning the resolutions discussed at the bilateral meeting of 27 March 2023. S&V were still content to progress JLP as planned given that we believed that the outcomes of the 27 March 2023 meeting would be actioned and also considering Oxford's timetable to Reg 19.
26/06/2023	Oxford City Council	050 Minutes	Meeting - This was a meeting covering a range of Local Plan matters for both authorities. S&V provided an update on the JLP - our consultants commissioned to	S&V had methodological concerns regard Oxford City Council's unmet need <i>and this meeting cast doubt on Oxford's intention to resolve the</i>	This was early DTC engagement post Oxfordshire Plan 2050. The concerns of S&V about the	These minutes show that it had been three months since S&V believed some matters which we expected would be resolved (as agreed at the 27 March

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			<p>review the HENA and its issues, our LDS with a HELAA update and plan period.</p> <p>It was agreed to raise at the next OPPO (30.06.23) about how to take forward the conversation about Oxford unmet need.</p> <p>It was agreed that both sides would like to seek to reduce the scope of differences in opinion, and it was believed that this would mean that S&V methodological concerns would be investigated (it subsequently emerged that this didn't happen), however Oxford City stated that they remained confident in the robustness of the HENA and were not looking to make any significant revisions to the study.</p> <p>City stated that they would be writing up the details of the case for exceptional circumstances to go beyond the Standard Method to support the Plan but S&V thought that this should have been determined already.</p> <p>It was agreed to pick up other matters at OPPO.</p> <p>On HELAA capacity, it was clear that this work was still not completed by Oxford and interim figures were presented.</p> <p>Given the interim capacity and HENA need figures, the minutes note this about unmet need: “This is more encouraging than had been anticipated previously at Reg 18 stage.”</p> <p>A key extract from the minutes relevant to the S&V position on justified evidence for unmet need: ‘SODC & VOWH do not presently accept that there is a justified unmet need to consider.’</p> <p>A key extract from the minutes relevant to the presumed resolution to investigate the HENA methodology with the consultants: “At Reg 18 consultation SODC & VOWH raised queries about the HENA, City responded to these at the previous meeting. Agreed both sides would like to seek to reduce the scope of differences in opinion. However, City remain confident in the robustness of the HENA and is not looking to make any significant revisions to the study. The differences seem to be more about the philosophical approach of going beyond the minimum Standard Method figure, rather than about the technical robustness of the modelling per se.’</p>	<p>matters raised at the 27 March 2023 meeting and in S&V representations.</p> <p>City had still not determined their exceptional circumstances which S&V had queried in previous consultations.</p>	<p>methodological issues in the HENA evidence led S&V to be more risk averse with ensuring robustness its own evidence on housing needs.</p> <p>Given Oxford's indications on their latest work on interim housing capacity (higher) and HENA need figures, it became clear that the JLP could accommodate new unmet need.</p>	<p>2023 meeting), especially the intent to investigate the HENA concerns by raising the issues with the HENA consultants, were not yet actioned. The minutes (prepared by Oxford) show Oxford subsequently saw our points as philosophical arguments, not technical concerns – this is a change of approach which meant that the resolutions could not progress, and this shows that this was Oxford's choice, with the notes recording “City remain confident in the robustness of the HENA and is not looking to make any significant revisions to the study.”</p> <p>The minutes clearly show that at this stage S&V believed that there was no inevitability to their being new unmet need, it was still not justified.</p> <p>The minutes also show that considering the interim HELAA estimates, this is the point at which it was clear to all participants that the scale of any new unmet need would be manageable. For S&V, it was clear to us that the JLP could accommodate unmet need, even the full extent of it (i.e. without provision being shared by Cherwell or West Oxfordshire, which would not be a likely outcome in any case). This gave S&V reassurance that even though we fundamentally did not agree that the Oxford evidence on need and capacity was robust, there was a positive outcome or resolution through the JLP, should Oxford's Plan progress with new unmet need set.</p>

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			<p>A key extract from the minutes relevant to justified exceptional circumstances: 'City will be writing up the details of the case for exceptional circumstances to go beyond the SM to support the Plan'</p>			
30/06/2023	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	051 Agenda and Minutes	<p>Meeting - On unmet need, Oxford raised that they were in process of series of bi-lateral conversations with other districts on housing issues. One round of meetings following consultation on Reg 18 pt2 (HENA), to be followed by a round of meetings on capacity (HELAA).</p> <p>Agreed with all it would be good to discuss the process for continuing those conversations maybe on a more collective Oxfordshire basis. Cherwell suggested FOP PAG. S&V expressed wariness of collective decision taking process for this issue, e.g. using FOP in the absence of Oxfordshire Plan. Cherwell raised a suggestion of a county-wide Oxfordshire SoCG to support their local plan. An action was agreed to review requirements for this and the proposed approach in each district, come back and discuss at next meeting, and a request from Oxford for all to take internal soundings around how they would like to take forward the conversation with the City on need/unmet need. S&V confirmed no formal request received from Oxford City on unmet need. All to discuss internally and feedback. There were also updates on FOP - PAG Officer meeting, on OXIS and on the GTAA, with consultants about to be appointed.</p> <p>A key extract from the minutes relevant to the perception of the scale of potential new unmet need: 'reflection on meeting earlier in the week with City is that the number is not as scary as might have been predicted.'</p> <p>A key extract from the minutes relevant to S&V interpretation of unmet need: 'CH: Will S&V Reg18 make assumption of no unmet need? LM: at the moment yes, as we've had no formal request from the City on unmet need.'</p>	<p>Process for conversations on unmet need raised, each district to consider further.</p> <p>The minutes show that there was a discussion about Countywide SoCGs to accompany Oxford's local plan and an agreement to seek a resolution on how to progress it, to bring to the next OPPO meeting. This meeting was brought forward to an earlier date than usual to maintain momentum.</p>	Councils providing updates on local plans and addressing SOCG requirements and approaches.	<p>These minutes demonstrate that there was a collective view amongst Oxfordshire authorities that the potential for new unmet need was not significant in scale for this round of local plans to potentially resolve, if Oxford's evidence was correct.</p> <p>These minutes also demonstrate that S&V were still of the view that it was not inevitable that there would be no new unmet need, and that our forthcoming JLP Reg 18 part 2 would progress on that basis.</p>
19/07/2023	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	053 Agenda and Minutes	<p>Meeting - Exploratory discussion on county-wide wide and bi-lateral SoCG, some divergence of views, West took an action to research examples of SOCGs from elsewhere.</p>	On Statements of Common Ground, some divergence of views, with S&V expressing preference for bilateral SOCG and others preferring a County-wide SOCG. This is because it was clear that S&V had raised very	Discussion on housing numbers helped develop thinking on JLP housing requirement and approach to existing/additional unmet needs.	These minutes and outcome regarding SoCG production show S&V willingness to be active and constructive in our engagements, despite it being clear we may have to respond to Oxford's Regulation 19 in a different way to others

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			<p>How districts would like to progress the conversations on Oxford's housing numbers led to an offer from Oxford to circulate a paper setting out the figures. West had doubts about using FOP structure. Oxford and Cherwell expressed a preference for using OPPO for unmet need discussions. S&V expressed that a discussion would need to be an officer and member discussion and involve senior officers, so suggested the initial mechanism might be Oxford writing a formal request on unmet need, addressed to the Chief Executive.</p> <p>There was an additional item on approach to calculating unmet need, with a query specifically from S&V about approach to the plan periods in adopted and emerging plans and how this might impact on unmet need numbers.</p>	<p>significant concerns with Oxford's Reg 18 plan and evidence, more than others in Oxfordshire had. Despite this S&V went with the majority view to try an Oxfordshire wide approach to SoCG.</p> <p>Also discussion on what is the right forum for conversations on unmet needs (FOP/OPPO etc). Oxford subsequently produced a draft note on housing numbers which County, West, S&V fed back on to help make progress.</p>		<p>in Oxfordshire, given our lack of resolution from earlier plan production stages coupled with no willingness from Oxford to action any resolutions that we thought were going to be progressed.</p> <p>The meeting minutes show that S&V wanted to highlight some practical questions to seek agreement about how our plans will have to consider unmet need over the new plan periods to de-risk our approaches. This is evidence of our ongoing constructive approach when there are potentially similar issues in our plans in Oxfordshire.</p>
25/08/2023	Oxfordshire Local Planning Authorities (OPPO leads)	056 Email and attached annotated note	<p>Email - This email responded to a note from the OPPO of 11 August. It reminded Oxford City Council about the expectation that S&V had that methodological issues surrounding the HENA evidence was explored with the HENA consultants.</p> <p>Some key extracts from the draft note:</p> <ol style="list-style-type: none"> Oxford text - 'This note sets out the City's calculations to date. It is drafted in the full knowledge that some of the districts intend to challenge the work behind constituent parts of the City Council's evidence base but is intended to provide a helpful outline of the City's work thus far'. S&V comment 'We make specific comments within this note in response to the text included. There are deeper issues with the HENA and the approach to unmet need which remain unresolved and not specifically repeated below but will need to be resolved in future engagement.' S&V comment 'We haven't discussed the contents of our previous responses - S&V are awaiting a response to the key matters of the HENA issues and exceptional circumstances' Oxford text: 'The City Council acknowledges that it will need to make the case for the approach taken in the HENA and the exceptional circumstances and that South and Vale intend to challenge the HENA' S&V comment 'We cannot seriously discuss types of apportionment until the issues with the 	<p>There remained a disagreement with the methodological concerns with the HENA in relation to new unmet need from Oxford city.</p> <p>This email shows that with the ending of the Oxfordshire Plan 2050, S&V restructured their attendance at OPPO meetings to add a second lead officer and ensure we could engage better on the Duty to Cooperate concerns raised.</p>	<p>The engagement shows S&V taking steps to ensure their engagement setup with other authorities was robust and could be done consistently through OPPO.</p>	<p>This email (read in conjunction with the 27 March 2023 minutes, 26 April 2023 minutes and 26 June 2023 minutes) show that we repeatedly expected and sought the resolution on the HENA methodological issues prior to Oxford's Reg 19, and this email alerts to this not yet being resolved.</p> <p>Key extracts (1 and 4) from the draft note indicated that Oxford were at this point determined to progress the evidence as is, not addressing the significant concerns S&V had raised. Oxford had not sought resolution, despite our repeated asks and repetition of it as shown at key extracts 2 and 3. S&V proposed track changes to key extract 4 say that if Oxford addressed the concerns, it was <u>not</u> inevitable that S&V would challenge their Plan, and that we urged them again, to address our earlier comments.</p> <p>Key extracts (2, 3 and 5) demonstrate our urgency for a resolution, rather than a desire to leave this unresolved.</p> <p>Key extract 6 demonstrates that Oxford were presenting this note with their view that delivery against their current agreed unmet need had started in the period from 2018-2021 (it had in Vale), and they were content that the nomination</p>

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			<p><i>amount of unmet need and the exceptional circumstances are responded to.'</i></p> <p>6. Oxford text – <i>'Each of the Oxfordshire authorities made provision for the above figures through the last round of Local Plans. In total, the other Oxfordshire districts made provision for and allocated sites to accommodate 14,300 dwellings (14,850 minus the 550 apportioned for Oxford). Many of these sites have started to be delivered or are in pre-application or planning application stages. In addition, nominations agreements over the affordable housing element of that provision have been signed with WODC, SOCG, VOWH.'</i></p>			<p>agreements had been signed. This contrasts with Oxford's later Reg 19 / examination stage questioning of how this period is dealt with. S&V view on this is that the JLP continues this agreed approach (an approach which this draft paper evidences Oxford were originally content with).</p>
05/09/2023	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	060 Minutes and Notes	<p>Meeting - For discussion on Oxford's unmet needs, Oxford City Council in advance circulated a draft paper entitled "Note on Oxford's Housing Numbers - August 2023".</p> <p>We circulated updated figures on 11 October 2023 prepared by our monitoring officer.</p> <p>Oxfordshire County Council had also shared a draft paper "Oxfordshire County Council Note - Housing Need and Oxford's Unmet Need" with some calculations and lists of sites (attached).</p> <p>A key extract from the OCC Note: 'More housing could be accommodated in sites already allocated close to Oxford as set out in Table 2... South Oxfordshire 5,900 (950 more than requirement)... VOWH 2,710 (510 more than requirement)... Grand Running total = 17,146 (2,846 more than agreed)'</p>	<p>S&V questioned whether Oxford not sharing their exceptional circumstances case for going above the standard method was a lack of co-operation.</p> <p>Oxford had agreed to review the comments S&V made on the initial paper (in 056) and make a revised version, but S&V specific matters raised on Oxford's evidence were not taken forward by Oxford.</p>	<p>Discussion on housing numbers helped develop thinking on JLP housing requirement and approach to existing/additional unmet needs. The numbers presented by OCC showed that if the Standard Method was used to calculate Oxford's needs there would be no additional unmet need, allowing for Oxford's assessment of its capacity and the agreed contributions from provision already made by adopted local plans. The numbers also showed that even if the Oxford HENA approach was used, there was sufficient surplus capacity within the existing provision to meet the suggested Oxford need and there would be no additional unmet need. These figures reassured S&V that the emerging JLP was robust enough to accommodate any needs demonstrated by Oxford, however the methodological disagreement was resolved, without needing to change the proposed JLP strategy or the proposed JLP allocations.</p>	<p>The OCC note demonstrates that S&V were engaging on specific discussions about potential solutions to new unmet need. This was constructive in the context that S&V had been challenging the evidence behind new unmet need, and given that Oxford were not making any attempt to resolve those challenges. Working on the County note is evidence of our continued discussions about how the JLP could accommodate unmet need.</p>

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03/10/2023	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	063 Minutes and Notes	Meeting - This OPPO was focussed on an in-person workshop on a potential structure of an Oxfordshire SOCG, to be structured around the outcomes of the Oxfordshire Strategic Vision. Meeting agreed to use the proposed structure as the basis and spent the rest of the meeting collectively working it, populating ideas for points that could be documented under each objective.	No points of disagreement	This was the start of collective work on drawing up an Oxfordshire-wide SOCG.	This demonstrated S&V's constructive engagement on the Countywide SoCG in establishing its structure. This work developed into the Oxfordshire-wide SoCG that supported the Oxford Local Plan, and then later the version that supports the JLP (DUC02).
07/11/2023	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	069 Agenda and Minutes	<p>Meeting - On housing numbers, Oxford had circulated their legal advice about the HENA and S&V confirmed issues remained outstanding about the HENA.</p> <p>On the joint SOCG, some discussion on structure getting complex if based around the Oxfordshire Strategic Vision, West offered to restructure it.</p> <p>Some key extracts from the Minutes:</p> <ol style="list-style-type: none"> 'EB stated that there were still planning issues outstanding with regards to S&V concerns on the HENA. RW recognised this was always likely to be the case' CH (West Oxfordshire): 'if City are happy with the risks related to their work but others have concerns that'll be dealt with at examination'. 	<p>Disagreement about the HENA, Oxford said they accepted the risks related to their work and if others have concerns that'll be dealt with at examination.</p> <p>There was an agreed action to see if Oxfordshire County Council had the information that they needed to update their note on unmet housing need numbers (Note in 060 of LPA02.1).</p>		<p>The minutes demonstrate the ongoing attempts by S&V to resolve the matters which we had thought would be resolved following the 27 March 2023 bilateral meeting with Oxford. It also shows us working on the County note, so that is evidence of our continued discussions about how the JLP could accommodate unmet need.</p> <p>These minutes record Oxford stating that the outstanding concerns 'was always likely to be the case'. As the S&V commentary on the Oxford unmet need note (056) demonstrated, as well as earlier entries since the meeting of 27 March 2023, this was not the case.</p> <p>S&V urged a resolution repeatedly, but the minutes and responses from Oxford show they were not wishing to resolve, and that it was Oxford who saw these matters as being an inevitable examination debate. The same conclusion was drawn by West Oxfordshire in these minutes, with them stating that City will have to be content with that risk.</p>
06/12/2023	OPPO (Oxford City Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	071 Minutes	Meeting - On unmet need, the County Council had updated a draft note to include some newer housing data, suggestion from Cherwell to move some of this material into the emerging joint SOCG. Oxford confirmed they have booked meetings with each authority over the next week or so to discuss housing in more detail, and Oxford will be sending a formal letter requesting help with unmet need very shortly.	<p>Oxford indicated they would be writing formally to districts shortly to help with unmet housing need.</p> <p>It was agreed that the note from OCC would become a working document (no agreement had yet been reached about its contents).</p> <p>Oxford had received the feedback from S&V on the note they prepared, but that paper was not subsequently updated by Oxford.</p>		These minutes show S&V engagement on unmet housing need from Oxford continues through the preparation of SoCG and in the tweaks to the Oxfordshire County Council note on meeting unmet need, which was inputted into on the basis that unmet need sites could be taken forward in the JLP.

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12/12/2023	Cherwell District Council	N/A	Meeting - This was a Brief MS Teams discussion between an officer at S&V and one at Cherwell about the previous S&V matters raised regarding the Oxford and Cherwell Housing Needs Assessment and sharing of previous critiques with new officer at Cherwell in an attempt at resolution and understanding.	The discussion was an attempt at understanding and to discuss a possible meeting in early 2024 with Oxford, Cherwell and S&V officers, unless these matters can be covered in the planned Oxfordshire SOCG.	No changes to JLP evidence or policy	The conversation was constructive by clarifying each authority's positions on housing evidence in the HENA and the intentions of each local plan going forward.
19/12/2023	Oxford City Council	074 Notes	<p>Meeting - This meeting was generally about talking through key policies for Oxford, and to discuss any queries S&V had.</p> <p>It was explained that capacity of Oxford and accuracy of the HELAA would impact on the future JLP.</p> <p>It was explained that work with consultants to review the HELAA and the Oxford and Cherwell Housing and Employment Needs Assessment was complete and both reports were intended to be appended to the S&V Reg 19 response.</p> <p>S&V gave a verbal update about some key headline conclusions from their HELAA review prior to the submission of responses.</p> <p>Oxford stated their thought that no need is currently identified for further technical work.</p> <p>Oxford confirmed their intention to issue a formal request to all districts to ask for assistance with meeting unmet housing needs.</p> <p>Key extract from the minutes: "OCC stated that this would be a matter for the Oxford City Local Plan examination to consider"</p>	<p>S&V maintained disagreement with HENA and concern about HELAA underestimates of capacity.</p> <p>S&V queried whether a technical response is pending from Icenii in response to HENA matters raised by S&V in March 2023 which hadn't been responded to. Oxford stated that they believed that there is no need identified for further technical work. (Oxford have previously shared the legal response to the legal queries raised, as well as sharing with OPPO). Oxford stated that this would be a matter for the Oxford City Local Plan examination to consider. S&V noted they were also seeking legal advice on this amongst other matters (as this approach was not, in our view at that time, compliant with the DtC).</p> <p>It was subsequently raised at Examination as no resolution could be sought prior to that.</p>	No changes to JLP evidence or policy.	<p>These minutes show that S&V used this opportunity to again urge Oxford to query the HENA methodology issues we had raised nine months earlier. Oxford said that they did not identify the need to.</p> <p>It is significant that at the joint meeting, Oxford is recorded as saying in relation to the discussion on the HENA and HELAA and the respective disagreements, that 'no need currently identified for further technical work [on the HENA]. OCC stated that this would be a matter for the Oxford City Local Plan examination to consider'. Thus, it was Oxford, after having used the various OPPO meetings to discuss the additional unmet need issue and being aware that that process had not produced an agreed position, which said that the disagreement was to be addressed via their local plan examination. In contrast, it was S&V in the letter of 19 January 2024 that was urging that the OLP should not be submitted, and Oxford was asked to engage further and more productively.</p>
21/12/2023	Oxford City Council	<p>See Consultation Response (South Oxfordshire) - Doc C in Appendix 4 (LPA02.4)</p> <p>See Consultation Response (Vale of White Horse) - Doc C in Appendix 4 (LPA02.4)</p>	<p>Consultation Response - A response to Oxford City Council's Consultation on their submission draft (Regulation 19) Local Plan 2040.</p> <p>S&V raised that the Oxford City Local Plan has not been prepared following ongoing, constructive, and active engagement with S&V, highlighting in particular the lack of engagement on matters of housing need, including the choice to depart from the Standard Method, and whether there are exceptional circumstances to justify the departure. S&V also highlighted the lack of engagement with S&V to identify an alternative methodology suitable for establishing an alternative housing need figure.</p> <p>S&V highlighted that we have previously raised concerns in relation to the DtC and housing need in our</p>	<p>Continued disagreement over the decision to deviate from the standard method and levels of unmet need from Oxford City as well as again highlighting the lack of engagement from Oxford City on strategic matters.</p> <p>S&V strongly urged Oxford City to reconsider their approach and engage with us on unresolved housing need matters.</p>	This was in relation to Oxford's (emerging but now withdrawn) Local Plan 2040. There are no direct implications for our plan, although touches on matters relating to unmet need from Oxford.	This consultation response presents the planning arguments, as well as the S&V view of Oxford's engagement activities following the numerous attempts made by S&V to seek resolutions.

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			<p>previous consultation representations. S&V note the meeting taking place on 27 March 2023, but that the meeting did not resolve the issues raised or identify a process for their resolution that had been acted upon since, and that there has been no subsequent active, constructive, or ongoing engagement.</p> <p>S&V raised that the submitted plan failed to meet the DtC and urged Oxford to engage with S&V on outstanding unresolved strategic matters.</p> <p>Our request S&V set out in the response is as follows: <i>'the Council is strongly urged to reconsider its approach and, even at this late stage of the plan-preparation process, to engage on an on-going, constructive, and active basis with both SODC and VOWHDC on the strategic matter of housing, and on how such needs should be identified, and to what extent there are any unmet needs, having regard to the potential to meet those needs within the Local Plan area, and on what should be done as regards any properly evidenced unmet needs'.</i></p>			
22/12/2023	Oxford City Council	075 Letter	<p>Letter - Letter from Oxford formally requesting assistance to meet claimed unmet housing need.</p> <p>A key extract from the letter: 'It is a very positive step that many of the identified sites related to Oxford unmet need are already now under construction, and several more are in the planning process.'</p>	Continued disagreement over the levels of unmet need from Oxford City.	This was in relation to Oxford's (emerging, but now withdrawn) Local Plan 2040. There are no direct implications for our plan, although touches on matters relating to unmet need from Oxford.	As with the entry from 25 August 2023, the key extracted text from this letter from Oxford demonstrates that Oxford were still presenting the view that delivery had started in the period from 2018-2021 (it had in Vale) and they saw this as a positive step. This contrasts with Oxford's later Reg 19 / examination stage questioning if there had been any delivery in this period. S&V's position on this is that the JLP continues this agreed approach (which the August 2023 draft paper and this letter are evidence of Oxford being content with).
09/01/2024	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	076 Minutes	<p>Meeting - On a Joint Oxfordshire SOCG for Oxford's Local Plan, Oxford seeking feedback on a draft so that next OPPO can be refining a nearly final version.</p> <p>Oxford had written formally to districts on 22 December 2023 to help with unmet housing need, Oxford seeking feedback and agreed to discuss at next OPPO meeting.</p> <p>Oxford indicated at this meeting they were still intending to submit their Local Plan by the end of March 2024.</p> <p>Key extract from the minutes regarding SoCG progression: 'RW (Oxford) - The plan had been to</p>	No points of disagreement	On housing, the engagement helped discuss specialist housing need evidence, with two studies underway (OCC's and JHNA). On housing, discussions on unmet need helped inform JLP housing policy HOU1.	<p>These minutes demonstrate that S&V had continued to be actively engaged on the preparation of the draft Oxfordshire-wide SoCG.</p> <p>The minutes include an update on Local Plans, when it became clear that Oxford had decided to continue to submit their Local Plan for examination. Their Reg 19 had closed on 5 January, 4 days prior to Oxford explaining this to the OPPO group.</p>

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			<i>collate everyone's answers to CH's questions on the previous version to inform this item but only EB (S&V) responded yesterday.'</i>			
10/01/2024	Public consultation including all statutory bodies and neighbouring local authorities	077 Consultation notifications	JLP Consultation - Preferred Options Consultation Regulation 18 Part 2 - Public Consultation.	For a summary of the comments made and S&V's response please refer to the Regulation 18 Part 2 Preferred Options Consultation Statement and appendices (examination library references LLP07.2 and LPP07.1).	Feedback from this consultation informed refinement of JLP core documents, supporting evidence and topic papers for the Regulation 19 Publication Period.	A formal stage of engagement in the JLP local plan.
19/01/2024	Oxford City Council	See Letter Document E in LPA02.4	<p>Letter - A response to Oxford City Council's formal request to assist with unmet housing need setting out that S&V would not accommodate additional unmet need beyond 2036 due to deficiencies in the evidence base underpinning their stated need. The letter requests Oxford City Council reconsider submitting the plan for examination, and instead engage with S&V on a more appropriate and productive way forward.</p> <p>Key extracts from the letter:</p> <ol style="list-style-type: none"> <i>'South Oxfordshire and Vale of White Horse District Councils submitted formal representations to your Regulation 19 stage Local Plan 2040 consultation on 21 December 2023. You may not have been aware of this at the time of your letter. These were submitted in the context of us having previously submitted individual responses to your March 2023 Housing Need consultation and your November 2022 Preferred Options consultation, at the Regulation 18 stages. Our recent representations to your Regulation 19 stage Local Plan 2040 reiterate our earlier responses to state that, as matters stand at present, your emerging Local Plan 2040 fails the legal duty to cooperate. We have also identified several soundness issues, and set out our long-standing concerns relating to the flaws in your evidence base on housing need and housing capacity, which inform your Regulation 19 local plan. You are aware of these concerns because we have responded at your formal plan consultation stages (Regulation 18 and 19) and we have also engaged in officer meetings about your Housing and Economic Needs Assessment (HENA) and Oxford Housing and Employment Land Availability Assessment.'</i> <i>'We would ask you to reflect carefully on your current intentions to submit your Regulation 19 local plan, as presently formulated, for</i> 	The letter sets out S&V and Oxford City Council's disagreement on approach for housing need. The letter makes a request for working together more productively.	This was in relation to Oxford's (emerging, but now withdrawn) Local Plan 2040. There are no direct implications for our plan, although touches on matters relating to unmet need from Oxford.	<p>The first key extract sets the context for S&V's response to the request, in that it summarises the history of engagement from S&V which was not actioned by Oxford.</p> <p>The second key extract is demonstrative of S&V's final attempt to ask Oxford re-think and engage on points made.</p>

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			<i>independent examination and would ask that instead, you engage with us on a more appropriate and productive way forward. However, we will in any event engage with you regarding any content that may be appropriate for a Statement of Common Ground.'</i>			
07/02/2024	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	079 Minutes	Meeting - There was a discussion on the latest version of the interim joint SOCG, and all agreed it would be useful to append to that the formal letters from Oxford on unmet need and the replies to the SOCG. Oxford expressed their intention to continue to submit their Local Plan.	S&V had sent a formal reply to Oxford's letter on 19 January 2024 raising flaws in Oxford's evidence base on housing need and housing capacity, and confirming that S&V could not currently agree to meet any unmet housing need that exists for the period after 2036 i.e. new unmet housing need that has not previously been accommodated, as the councils were not persuaded by Oxford's evidence base (given its deficiencies). OPPO agreed to summarise these areas of disagreement the Joint SOCG being finalised for Oxford's Local Plan, and append the formal letters from Oxford and the replies from each authority.	On housing, discussions on unmet need helped inform JLP housing policy HOU1.	These minutes show that despite S&V's final letter with a plea to engage on the housing need evidence, Oxford had expressed their intention to submit their Local Plan. These minutes demonstrate that S&V had continued to be actively engaged in the preparation of draft Oxfordshire-wide SoCG.
07/03/2024	Cherwell District Council	081 Notes	Meeting - This was a meeting to discuss matters related to the duty to cooperate and outstanding issues which could help progress towards resolutions, particularly related to the Housing Needs Assessment Cherwell and Oxford were using at that time. We clarified to Cherwell what our unresolved strategic matters are in relation to the Duty to Cooperate. We discussed in depth the history of the HENA dispute and outstanding concerns. We noted that record keeping of notes was not covered well in OPPO minutes post 2022 during the period Cherwell has been chairing OPPO. Apportionment was discussed because Cherwell's Reg 18 had proposed an approach to it. Cherwell's approach in the Regulation 18 Local Plan was just an approach to tackling it, but that it doesn't mean that's the way they will take it forward in the Reg 19. Cherwell explained that they have pushed back to Oxford on matters such as the capacity of the City, and therefore haven't agreed a level of unmet need. Cherwell expect that the figure would be absorbed into the overall District figure, with control over the strategy for that development in the District.	We clarified to Cherwell what our unresolved strategic matters are in relation to the Housing Economic Needs Assessment.	Helped to ensure we were aligned on plans, evidence and to agree a SOCG.	These meeting minutes show that with Cherwell's and S&V's clear actions and agreements about how local plans will approach matters, there can be positive resolutions to the DtC in relation to the HENA, albeit at the time of this meeting both parties were aware that the methodological disagreements about the HENA would be aired at Oxford's examination imminently. The minutes also demonstrate that apportionment of unmet need was discussed, and it was Cherwell's view, (like S&V's) that decisions about the strategy to distribute any unmet need lay with Cherwell to be dealt with in their plan.
08/03/2024	OPPO (Oxford City Chair) S&V, Cherwell, West	082 Minutes	Meeting - Good progress reported on preparing SOCG for signing in time for submission of Oxford's Local Plan planned for end March 2024.	S&V working with Oxford City on a bilateral SOCG for the Oxford Local Plan.		These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG, including

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	Oxfordshire, Oxfordshire County Council					a bilateral SoCG as well as the Oxfordshire-wide SoCG.
16/04/2024	OPPO (Oxford City Chair) S&V, Cherwell, West Oxfordshire, Oxfordshire County Council	087 Minutes	Meeting - Update on local plans included that Oxford City had submitted their local plan for examination.	Areas of agreement and disagreement were set out in a Joint Oxfordshire SOCG (agreed by all Oxfordshire Councils) and a bilateral SOCG between South, Vale and Oxford City, which were completed in time to accompany the submission of Oxford's Local Plan at the end of March 2024.		These minutes confirm that S&V had continued to engage actively with the preparation and signing of draft SoCGs to meet Oxford's submission deadline.
10/06/2024	Oxford City Council	See LNP05	Engagement with Oxford Local Plan hearings.	S&V appeared at the hearings to ensure resolution the outstanding concerns raised in our Regulation 19 representations and hearing statements.	This engagement was critical as the remaining opportunity to resolve outstanding significant matters which will have impacted on the JLPs approach to new unmet need, despite many attempts documented above from S&V to try to achieve a resolution.	Inevitable preparation of evidence, matters statements and attendance at the hearings to present S&V's concerns given the lack of resolution sought.
18/06/2024	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	095 Minutes	Meeting - Oxford Local Plan initial hearings had taken place in w/c 10 June, and Oxford indicated that a response would be likely after the elections (scheduled July 2024).	None recorded. Oxford unmet need issues with the Inspectors of the Oxford Local Plan. It was noted that Oxford's feedback from PINS had indicated a response about the outcome of their stage 1 hearings soon after the July 2024 elections.		The minutes have little details about the outcome of the unresolved unmet need issues; however some indications of timing were shared. Also S&V and Cherwell are making it clear that the approval process for JLP Reg 19 would fall after the receipt of the outcome of Oxford's initial hearings.
17/07/2024	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	097 Minutes	Meeting - Oxford confirmed that no outcome had yet been received about their first stage hearings and they expected it early August. It was confirmed at this meeting that the Cherwell and S&V next stages for their plans would remain aligned, and would follow that outcome for Oxford.	None recorded		The minutes make clear that the outcome of the first stage hearings remained outstanding, and the S&V and Cherwell approvals of their Local Plans would remain timed after the outcome of the unresolved housing need matters from Oxford.
15/08/2024	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	100 Minutes	Meeting - S&V accelerating JLP timetable planning to hold Regulation 19 consultation in October and submit in December 2024. Sharing of press release regarding response to new NPPF. Discussion about Oxford sewerage treatment infrastructure delays, and potential impacts on trajectories on sites and unmet need sites within its catchment. S&V to start reaching out to other authorities on preparing SOCG for the JLP.			The minutes make clear that the outcome of the first stage hearings remained outstanding, and the S&V and Cherwell approvals of their Local Plans would remain timed after the outcome of the unresolved housing need matters from Oxford.

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						These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.
12/09/2024	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council, Arc4 Consultancy	102 Minutes	<p>Meeting - S&V shared a first draft of an Oxfordshire SoCG to other authorities for the JLP.</p> <p>Oxford indicated the position with their Local Plan was the same as the previous meeting (although it was subsequently seen that the date of the letter from PINS with the initial conclusions was the day prior to this OPPO meeting).</p>	Agreement to continue to work toward a joint SOCG for S&V JLP.		These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.
27/09/2024	Oxford City Council	<p>See OLP Inspectors' write to Oxford City Council (examination library reference LNP05)</p> <p>See Oxford City Council write to OLP Inspectors' (This letter is submitted as a new examination library document as part of one of the post hearing actions and does not yet have an examination library reference. The letter can be viewed on Oxford City Council's website).</p>	<p>On 27 September two letters with the Planning Inspectorate were published on the Oxford City Council website with the outcome of the Oxford City hearings and Oxford's challenge to the outcome:</p> <ul style="list-style-type: none"> 11 September 2024: OLP Inspectors' write to Oxford (examination library reference LNP05) 25 September 2024: Oxford write to the OLP Inspectors' (During the matter 2 JLP hearing sessions, this was requested to be added to the examination library. The letter does not yet have an examination library reference but The letter can be viewed on Oxford City Council's website). 	The Inspectors' letter provided an outcome, however there could not still be a definitive resolution, because Oxford had challenged the outcome with PINS.	The outcome provided S&V with the resolution in relation to whether new unmet need would need to be added to the JLP, but it could only be considered 'provisional' in nature until Oxford's challenge had been responded to.	These letters demonstrate that Oxford failed to respond in accordance with the DtC to the repeated constructive attempts to resolve the matters that S&V had been raising about evidence on housing need. Oxford had determined to submit their Plan for examination rather than resolve the matters. The 11 September letter demonstrates that in these circumstances, the necessity for S&V to ultimately challenge the Oxford local plan at examination was entirely inevitable once Oxford had determined that to be the course, and was also justified.
01/10/2024	Public consultation including all statutory bodies and neighbouring local authorities	106 Consultation notifications	JLP Consultation - Publication Period Regulation 19 - Public Consultation.	For a summary of the comments made and S&V's response please refer to the Regulation 22 Consultation Statement and appendices (examination library references CSD10 and CSD10.1).	Opportunity for the comments raised to feed into proposed modifications (CSD01.1)	A formal publication stage of the JLP local plan and an opportunity for representations from the other authorities.

Table B: All activities related to housing need						
Date	Engagement with	ii) Records (minutes etc reference in Appendix 2/4)	(iii) Outcome, actions or action list (Notes or Summaries)	(iv) Areas of disagreement and how attempts have been made to resolve them	(v) How the engagement influenced the development of the evidence base and Plan policy	How the engagement was constructive, active, and on-going
10/10/2024	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	108 Minutes	<p>Meeting - Oxford confirmed that they had received the letter from the Inspectors and that there is no other news as of yet.</p> <p>The progression of the SoCG is discussed as well as alignment of that with each Councils Reg 19 responses to the JLP.</p>	Continues agreement to work towards a joint SOCG for S&V JLP, and to feed in forthcoming points raised in any Reg 19 representations from authorities.		<p>These minutes demonstrate that Oxford were not able or willing to share more about their likely next steps whilst they were awaiting a response to their challenge to PINS.</p> <p>These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.</p>
15/10/2024	Cherwell District Council	109 Minutes	<p>Meeting - both parties provided an update on their local plans.</p> <p>Officers discussed Cherwell's responses to the previous JLP Regulation 18 consultations and actions taken in response.</p> <p>The conversation included the role of meetings to resolve issues like OPPO and FOP (and confirmed we both send attendees to the FOP sub-groups). Both parties had heard a call for those FOP meetings to work better to support on planning matters, but have not heard that there is an actual call for/potential for those to be reviewed.</p> <p>Heads of Planning meetings raised but S&V structures means it's not the best forum for plan-making matters. S&V Planning Policy Manager attends HoP occasionally but the last meeting was challenging and S&V are wanting to give Oxford the space to come to their conclusions about next steps regarding their Local Plan Inspectors' report conclusions.</p> <p>Key extracts from these minutes:</p> <ol style="list-style-type: none"> <i>'The approach to housing figures has been to move away from HENA, except with regards to Specialist Housing Need, rollback on the previous evidence base, using the current Standard Method Numbers and like S&V are adding Oxford City's agreed unmet needs of 4,400 units.'</i> <i>'All the sites allocated to meet the City's unmet needs are being rolled forward.'</i> <i>'Oxford City's response to the Inspector and their next steps were speculated on, as it was queried what the potential implications may be for both Plans going forward, but both agreed we need to know what Oxford intend to do next.'</i> 	<p>Both parties agreed that there needs to be an indication from Oxford about their next steps.</p> <p>Both parties agreed on the importance of ongoing discussions on various strategic matters.</p> <p>Cherwell maintained that the issue of an appropriate balance between housing and employment should be ensured and will likely be raised in the Regulation 19 response, however S&V clarified that since Regulation 18 stage our ELNA and JHNA consultants have engaged and reported contentment to S&V with the appropriate balance being struck.</p> <p>Both parties agreed it was important to maintain sites for Oxford unmet need.</p> <p>The meeting overall offered an opportunity to discuss each party's outstanding key strategic matters with the respective plans, but both parties expressed that concerns had largely fallen away.</p> <p>Both parties agreed that engagement on the SOCG should continue and S&V expressed the importance of informal relationships and offer informal chats about policy matters.</p>	<p>The Cherwell engagement has led to S&V coordinating its plan between the ELNA and HNA consultants.</p>	<p>These bilateral meeting minutes discuss Oxford unmet need, so this is a relevant engagement to reflect upon.</p> <p>Key extracts from the minutes (1, 2, 4 and 5) demonstrate that there was a shared view between S&V and Cherwell that the Oxford Inspectors' letter (See Table B entry of 27/09/2024, located within examination library reference LNP05) had provided some resolution to the matters related to the HENA evidence, as well as many points of alignment between S&V and Cherwell approaches to dealing with Oxford unmet need and new unmet need.</p> <p>The key extract 3 from the minutes demonstrate that S&V and Cherwell were reflecting on the lack of willingness of Oxford to provide information about the next steps for their plan at the 10 October 2024 OPPO.</p> <p>These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.</p>

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			<p>4. <i>'S&V raised previous that a housing need approach based on HENA would bring significant challenge to S&V, which although CDC has previously clarified was not the intention, in reality this challenged has happened with many in the development industry seeking to use the HENA figures for S&V to undermine the JLP. Both agree that by not following the HENA approach, this would resolve this issue of dispute.'</i></p> <p>5. <i>'CDC clarified that the approach to be taken is the Standard Method plus unmet needs as the practical approach.'</i></p>			
07/11/2024	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	115 Minutes	<p>Meeting –</p> <p><i>Key extract from the minutes from Oxford about their Local Plan: 'Not much has changed externally and haven't yet received any response from the Inspector to the Council's letter. RW is planning on getting a report to cabinet and council with a plan of action in January.'</i></p> <p>SoCG related to the JLP was discussed.</p>	Agreement to continue to work toward a joint SOCG for S&V JLP.		<p>These minutes demonstrate that Oxford were not able or willing to share more about their likely next steps whilst they were awaiting a response to their challenge to PINS. This was the second OPPO meeting since the initial conclusions were published without any discussion about the next steps for Oxford.</p> <p>These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.</p>
12/11/2024	Oxford City Council	See Oxford City Council Reg 19 Consultation responses	Oxford submit Reg.19 representations on JLP.			A formal stage of engagement on the JLP.
20/11/2024	Oxford City Council	See Oxford City Council write to OLP Inspectors' (This letter is submitted as a new examination library document as part of one of the post hearing actions and does not yet have an examination library	<p>Oxford Local Plan Inspectors write to Oxford in reply to letter of 25 September 2024.</p> <p><i>Key extracts from the letter: 'I have read your letter and I remain satisfied that the Post Hearings Letter is clear and provides an accurate assessment of the situation. In short, I stand by the findings previously articulated.'</i></p>		It gave an outcome in terms of the evidence of new unmet need – that it was not justified for inclusion in the JLP.	In S&V's view the content of this letter left little option for Oxford in terms of the need for their Local Plan to be withdrawn. It was finally a resolution which we tried to talk to Oxford about (see Table A entry dated 26/11/2024).

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		reference. The letter can be viewed on Oxford City Council's website).				
26/11/2024	Oxford City Council	See DtC statement at CSD09.1, Appendix 2	<p>Within days of the second Inspectors' letter to Oxford being published, S&V write to Oxford requesting information on what Oxford will do with OLP and asking for any information on identifying housing need.</p> <p>Key extracts from the letter:</p> <ol style="list-style-type: none"><i>'I refer to the representations dated 12 November 2024 that Oxford City Council (Oxford) submitted to the Proposed Submission version of the Joint Local Plan 2041 (the JLP). As I expect you know, those representations seek to suggest that there has been non-compliance by South Oxfordshire and Vale of White Horse District Councils (the Councils) with the legal duty to co-operate in the preparation of the JLP. That contention is not accepted by the Councils and it is disappointing that Oxford has seen fit to make such a suggestion for the first time at such a late stage in the preparation of the JLP, noting that no such claim was made in Oxford's earlier consultation responses or in the successive Oxfordshire Planning Policy Officers group (OPPO) meetings, where there has been considerable opportunity for raising this.'</i><i>'the purpose of this letter is to seek to understand what Oxford now intends to do in relation to its own Oxford Local Plan 2040 (the OLP) and future plan-making for its area, having regard to the most recent letter from the OLP examining Inspectors, dated 20 November 2024.'</i><i>'Notwithstanding that clearly expressed concern about the duty to co-operate (which echoes the point made in our letter dated 17 March 2023 in response to the Regulation 18 consultation on the OLP) and that explicit request for engagement on a more appropriate and productive way forward, Oxford proceeded to submit the OLP shortly thereafter and there was no such engagement on any alternative approach to the matters where it was apparent that Oxford and the Councils were not in agreement. Those disagreements were therefore, regrettably, played out in front of the</i>	The first key extract from this letter shows that Oxford had not raised concerns about the Duty to Co-operate during JLP plan preparation. This was an unexpected change in view.	Key extracts 2, 4, 5, 6 and 7 from this letter demonstrate that S&V, having reflected on the outcome of the Oxford examination, enquired of Oxford what they were intending to do next, and how unmet need may be dealt with. This was to ensure that we were as constructive as we could be in the discussions about unmet need prior to the JLP submission.	

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			<p><i>OLP examining Inspectors, with the results that we have seen, as expressed in their letters dated 11 September 2024 and 20 November 2024. Those letters confirm that the Councils were justified in the concerns they raised and that there was a failure of the duty to cooperate by Oxford in the preparation of the OLP. I make these points not for the purpose of vindication of the Councils' actions but to highlight that the outcome was one that the Councils sought to avoid so far as they reasonably could.'</i></p> <p>4. <i>'That then leads us to the position of what Oxford will do now. The letter dated 20 November 2024 presents Oxford with a choice in terms of procedural routes to be followed, but they both lead to the same result, namely that the OLP will not proceed to become an adopted local plan.'</i></p> <p>5. <i>'In addition, on the reasonable assumption that the OLP will not now progress further, I would be grateful if you can inform me what steps Oxford will be invited to take as regards future plan-making and the timetable for that.'</i></p> <p>6. <i>'Notwithstanding the earlier disagreements between Oxford and the Councils on how to assess and meet needs, which were ventilated at the OLP examination, I assume that, for a whole variety of reasons (not least the Inspectors' findings and the proposed new National Planning Policy Framework), Oxford will be starting afresh in how it seeks to identify the needs that should be met by any new local plan and that, at present, no work has been done in that regard. I would be grateful if you could confirm this assumption or, if not, share any work that Oxford has undertaken to quantify its needs and how they are to be met.'</i></p> <p>7. <i>'I ask these questions because, as you are aware, the Councils are working to submit the JLP for examination before Christmas 2024, and it would be helpful to understand the latest position with the OLP and any replacement for it before they do so.'</i></p>			
28/11/2024	Oxford City Council	119 Minutes	<p>Meeting - This bilateral meeting was arranged to discuss Oxford's Regulation 19 representations, and specifically anything raised as a potential strategic matter, so S&V officers could explore the potential issue and effects that Oxford claim.</p> <p>The following matters were discussed:</p>	There remained a disagreement about the intent of the JLP, with Oxford expressing that the JLP employment strategy could be harmful but S&V contested this saying that the new allocations are not significant and assumptions made about delivery and	The meeting was held post Regulation 19 stage so did not impact on plan policy. The S&V ELNA consultants have been engaged to review the assumptions and claims made by Oxford, and	<p>These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.</p> <p>The key extracts 1-5 demonstrate that although S&V attempted to explain that we hadn't changed anything about the</p>

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			<ul style="list-style-type: none"> Employment need and supply, and its relationship with housing requirements. The meeting discussed the balance between employment and housing, the potential impact of the intended supply of employment on Oxford and on infrastructure and commuting rates, when the employment evidence was shared at different stages, Oxford's assumptions about jobs and delivery within their representation, misrepresentations within Oxford's representation about supply delivery dates and new allocations. Housing need and annualised housing requirements. Standard method and alternative methods. Delivery of housing supply. <p>We agreed to continued engagement and to prepare a SOCG.</p> <p>Key extracts from the minutes:</p> <ol style="list-style-type: none"> <i>S&V – ‘advised that the JLP uses the same approach that has been used previously in adopted plans...Vale’s adopted Local Plan Part 2 provides for delivering unmet need between 2019 and 2031. When Vale adopted the plan, this allocated additional housing in the Abingdon and Oxford Fringe Sub-Area, but that this was not specifically ringfenced as the delivery of Oxford’s unmet need.’</i> <i>Oxford – ‘those 2 years of need have been taken off the housing requirement in the JLP, and although S&V are stating that it has been completed from a point of view of Vale’s overall numbers, OC consider that the delivery of Oxford’s unmet need, including affordable housing, has not been evidenced.’</i> <i>S&V – ‘have never specified and ringfenced sites that aim to deliver unmet need...with market housing there is no way of controlling who from Oxford is going to move into specific sites, hence why unmet need is instead calculated as part of a housing requirement and addressed throughout the district...explained that with sites in both plans, which are geographically close to Oxford, there is no requirement in national policy or in set out in the current adopted plans that specify which homes are to be provided as unmet need. However, nomination rights for the affordable element (50%) are separate. S&V</i> 	<p>jobs numbers are not accurate. S&V also commented that the employment/housing balance has been explored by its Employment Land Needs Assessment (ELNA) and Joint Housing Needs Assessment (JHNA) consultants.</p> <p>It was agreed that continued engagement would include the preparation of a SOCG and need for ongoing discussions about the ELNA assumptions would help to resolve the issue of job number assumptions. There were no other areas of resolution related to this matter.</p>	initially conclude that there are no changes required to the ELNA.	JLP approach to identifying existing unmet need, Oxford had not come to the meeting to resolve the matter, and did not expect us to change our approach.

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			<p><i>acknowledge that we signed memoranda of understanding on nomination rights on specific sites allocated in the local plans.'</i></p> <p>4. <i>S&V – 'advised that the JLP approach aligns with other plans that address unmet need at other councils, for example, Luton and Central Bedfordshire had a similar disagreement, and the conclusion from the Inspector's report clarifies that the same approach taken by the JLP is a sound approach.'</i></p> <p>5. <i>Oxford 'confirmed that Oxford is not realistically expecting a change of position by South and Vale on any matter at this meeting as S&V's plan is being submitted next week.'</i></p>			
02/12/2024	Oxford City Council	See letter in Appendix 3 of CSD09.1	<p>Oxford reply to South and Vale's letter seeking clarity about next steps, to understand how to deal with new unmet need given the status of Oxford Local Plan.</p> <p>Key extracts from the letter: <i>'With regards to the OLP2040, in January officers will take a report to a meeting of our full Council for a decision on how to proceed, which will be accompanied by a draft Local Development Scheme (including associated timetable). We have spent the last several months proactively working through next steps, taking legal advice, reviewing options and assessing risks, as I am sure you would expect. We have also taken the opportunity to set out our genuine and significant concerns with the Inspector's conclusions and recommendations. This was done not with any expectation that the decision would be overturned, but instead with the aim of seeking some additional clarity. I'm sure you will have noted that the most recent response to us from the Planning Inspectorate did not address or engage with any of these concerns or indeed add any further clarity. In due course, we will be in touch on ongoing Duty to Cooperate matters arising from any next steps we take in respect of a Local Plan for Oxford. Until the papers are published as part of our democratic process it would be improper to confirm the details of the approach to be recommended outside of that process'.</i></p>			It is demonstrated in the key extract to this letter, that very little information would be provided by Oxford to S&V prior to submission of the JLP in terms of how Oxford would respond to the next steps of their Plan and unmet need. We had asked and taken that engagement as far as we could prior to our submission, given Oxford had not formed a position on unmet need, or at least had not communicated one.
05/12/2024	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	122 Minutes	Meeting - Final tweaks to the Joint Oxfordshire SoCG were discussed, and an update on bilateral SOCGs, with Cherwell's at draft stage and West and Oxford to follow. The joint Oxfordshire SOCG was also nearing signing stage.	None recorded.	Joint SOCG almost ready.	These minutes demonstrate that S&V had continued to be actively engaged on the preparation of draft SoCG.

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06/12/2024	Oxfordshire district councils	See SoCG examination library reference DUC02	Statement - Joint Oxfordshire SOCG between Cherwell District Council, Oxford City Council, South Oxfordshire District Council, Vale of White Horse District Council and West Oxfordshire District Council.	Please see examination library reference DUC02	None	This signing of the Joint SoCG by all parties demonstrate that S&V had continued to actively engage with neighbouring authorities right up to the submission date of the JLP (9 December 2024).
09/12/2024	Oxford City Council	127 Email	<p>Emails - This was an email chain between officers from S&V and Oxford City Council.</p> <p>On 5 December 2024 S&V asked Oxford about Cherwell's reference in their interim Duty to Co-operate Statement to Oxford and Cherwell's meeting and agreement to unmet need. The Cherwell statement says Oxford agreed with Cherwell's use of agreed unmet need, but this conflicted with Oxford's position on the JLP. S&V asked if the same approach agreed with Cherwell would now apply to S&V:</p> <p><i>"I've been skimming through the Cherwell Interim Statement of Common Ground Appendix 6 - Interim Regulation J 9 Duty to Cooperate statement pdf. Paragraph 4.13 says "Under either scenario above there is housing need to meet for Oxford, and we are continuing with our commitment to meet the identified need for 4,400 homes previously agreed by retaining relevant Local Plan policies. We do not, however, consider that we need to accommodate additional housing need for Oxford in this Local Plan. At a meeting on 15th October 2024, under the Duty to Cooperate, Cherwell and Oxford City Council reached an understanding that the 4,400 dwellings would be brought forward to meet unmet need. No additional accommodation was requested at that meeting." Would you be able to confirm the same applies elsewhere including South and Vale e.g. that nothing new is requested at this stage?"</i></p> <p>Oxford replied on 9 December 2024 not agreeing this: <i>"Our position on the South and Vale Plan (including on unmet need) is unchanged from our submitted representations."</i></p>	Oxford stated that their position on the S&V Plan (including on unmet need) is unchanged from our submitted representations.	None	<p>The email demonstrates that Cherwell presented a resolution in their DtC statement that there was an agreement with Oxford about there being no new unmet need to plan for, beyond what was in Oxford's adopted Local Plan.</p> <p>This email S&V attempted to get this resolution, and we asked Oxford about their position on new unmet need and whether it had changed since they wrote their Reg 19 responses to S&V's JLP. The response does not offer that agreement and resolution. It is our view that this was not constructive because of the inconsistency of the approach. Oxford's response to us appeared to suggest that Oxford may be challenging Cherwell on that apparent agreement, and we took a judgement that this discussion between Oxford and Cherwell may need to continue, and it was clear to us that Oxford were unwilling to resolve their challenge to how the JLP deals with unmet housing need. Note that Cherwell have continued this approach as they progress their Local Plan to submission in June 2025.</p>
14/01/2025	OPPO (S&V Chair) Oxford City, Cherwell, West Oxfordshire, Oxfordshire County Council	128 Minutes	Meeting - S&V advised that they had submitted the JLP for examination on 9 December. Oxford confirmed that a report will be going through scrutiny, cabinet and council, confirming that City would like to withdraw their local plan.	No points of disagreement	No direct impact on the JLP policies.	Continuing to update neighbouring authorities and share information.