

Appendix 1 | Chronology of Engagement with Exeter City Council | S106 / CIL / IDP

This document provides an audit-ready, merged chronology of correspondence and meetings between Royal Devon University Healthcare NHS Foundation Trust (RDUH), NHS Devon (via LPAE and Malcolm Dicken) and Exeter City Council (ECC). It covers Infrastructure Delivery Plan (IDP) evidence gathering, Regulation 19 policy development, Task & Finish Group activity, and preparation for the Exeter Local Plan Examination in Public.

Date	Type	Local Plan Stage	Subject / Purpose	Exeter City Council Contacts	NHS / Other Parties	Supporting Evidence / Audit Trail
27 Jun 2023	Physical Meeting	Pre-preparation	Round table event for LPAs	Roger Clotworthy	Dave Tarbet Malcolm Dicken	Emails discussing evidence required
25 Jan 2024	Email	Consultation	Evidence of how funding gap arises	Ian Collinson	Dave Tarbet Malcolm Dicken LPAE- Devon	Word Document signed by Trust CFO
02 Feb 2024	Email	Consultation	Acknowledging receipt of funding gap document and that it would be taken into account during the consultation	Roger Clotworthy		Email
30 Apr 2024	Meeting	Consultation	Meeting with CEO and Director of Place regarding policy	Bindu Arjoon Ian Collinson	Dave Tarbet Chris Tidman (Trust Deputy)	Emails discuss a path for policy development and exploring new tests of change e.g. health inequalities & digital health

			support following provision of evidence		Chief Executive)	
04 Oct 2024	Email	IDP	Request for Exeter Plan sites, costs and funding to inform IDP	George Marshall	Malcolm Dicken; LPAE-Devon	ECC request for NHS infrastructure inputs
23 Oct 2024	Email	IDP	Instruction to complete IDP spreadsheet to support future S106 / CIL		Malcolm Dicken; LPAE-Devon	IDP spreadsheet and guidance email
13 Nov 2024	Email	IDP	Confirmation NHS will provide Exeter IDP data	George Marshall	Malcolm Dicken; LPAE-Devon	Forwarded ECC IDP request
23 Jan 2025	Email	Water Lane development consultation	Introducing further evidence for s106 support for this major development	Howard Smith Ian Collinson	Dave Tarbet Katherine Allen	ECC inviting KA to discuss this at Exeter Place Board partnership
04 Feb 2025	Email	Water Lane development	Policy development (lack of)	Bindu Arjoon	Chris Tidman	D.CEO writing to ECC CEO expressing disappointment at lack of support from council during planning application/s
05 Feb 2025	Email	Policy development	Lack of progress has led to the establishment of a Task and Finish group to focus on policy development	Ian Collinson Roger Clotworthy	Dave Tarbet	T&FGs set up during spring/summer 2025

12 Feb 2025	Email	Policy development	Agreement following the Water Lane development viability issues that a new policy for acute healthcare would be established	Ian Collinson	Katheirne Allen	Email, agreed by Ian: "The commitment from ECC is to create a robust policy basis with RDUH that can be submitted to the Planning Inspectorate and provides a basis for decision making. In effect this would be a statement of common ground and enables us to reopen all of the claims (not WL) and apply s106."
03 Mar 2025	Email	Policy development	Agreement from chair of the T&FG the objectives of the group			Objectives: How Section 106 funding can support acute healthcare and health inequalities in Exeter. Alignment with Live and Move, Wellbeing Exeter, and the Exeter Vision 2040. Setting up a working group to take this forward, involving key representatives from both our organisations.
07 Mar 2025	Meeting	Reg 19 (policy development)	Discussion on S106 contributions & health inequalities	Roger Clotworthy	Dave Tarbet	Calendar entry
19 Mar 2025	Meeting	Reg 19 (policy development)	S106 Health Contributions Working Group (in person)	Roger Clotworthy; Matthew Diamond; George Marshall	Dave Tarbet	Calendar entry

21 Mar 2025	Email	Reg 19 (policy development)	Draft Terms of Reference – S106 Health Contributions Working Group	Roger Clotworthy	Dave Tarbet; Katherine Allen	Email with draft ToR
10 Apr 2025	Meeting	Reg 19 (policy development)	Healthcare S106 Task & Finish Group meeting	Roger Clotworthy	Dave Tarbet; ECC officers	Calendar entry
02 May 2025	Email	Reg 19 (policy development)	Update on Healthcare S106 Task & Finish Group progress	Roger Clotworthy	Dave Tarbet	Email confirming next steps
07 May 2025	Email	Reg 19 (policy development)	Follow-up note and actions from Health Inequalities meeting	Roger Clotworthy	Dave Tarbet; ECC officers	Email with summary note
30 May 2025	Email	Reg 19 policy development	Suggested agenda for first T&FG meeting	Roger Clotworthy George Marshall	Dave Tarbet	Email with agenda
23 Jun 2025	Email	Reg 19 policy development	Update on how infrastructure is being evaluated and providing a list of capital projects	Roger Clotworthy	Dave Tarbet	Introduction to HUDU model under evaluation by Malcolm Dicken
26 Jun 2025	Email	Reg 19 policy development	Concern from Roger that the “goal posts” has shifted	Roger Clotworthy	Dave Tarbet	Email response to 23 Jun email
09 Jul 2025	Email	Reg 19 policy development	Response to confirm why goal posts haven’t shifted	Roger Clotworthy	Dave Tarbet	Explanation why RDUH feels restricting s106 to health inequalities work is too narrow and why we seek support for

						health infrastructure in addition not treating HE as a replacement
09 Jul 2025	Meeting	Reg 19 (evidence development)	HUDU methodology walk-through		Dave Tarbet; Malcolm Dicken	Calendar entry
17 Jul 2025	Email	Reg 19 evidence development	Revising T&FG agenda to receive infrastructure arguments (& HUDU presentation)	Roger Clotworthy	Dave Tarbet	Email discussion and ECC sending NHS – Worcester judgement on infrastructure 31.7.23
29 Jul 2025	Meeting	Reg 19 (evidence development)	RDUH infrastructure calculator review		Malcolm Dicken; Dave Tarbet	Calendar entry
29 Jul 2025	Email	Reg 19 evidence development	LPAE-Devon providing latest Worcester (Lisa Peaty) document	Roger Clotworthy	Malcolm Dicken	Email discussion this infrastructure claim accepted by Banner KC
31 Jul 2025	Meeting	Reg 19 (evidence development)	HUDU review session		Malcolm Dicken; Dave Tarbet; Hannah O'Neill	Calendar entry
31 Jul 2025	Email	Reg 19 evidence development	Email from Ian Collinson confirming that he supports an approach looking at both acute care needs and health inequalities - "no crossed wires"	Ian Collinson	Dave Tarbet	Email discussion

05 Aug 2025	Email	Reg 19 (evidence development)	Document from LPAE-Devon to Trust preparing answers to the agenda item questions of T&FG – sent onto ECC	Roger Clotworthy	Malcolm Dicken Hannah O'Neill Dave Tarbet	Word Document
06 Aug 2025	Meeting	Reg 19 (evidence development)	HUDU calculator & infrastructure modelling		Malcolm Dicken; Dave Tarbet	Calendar entry
07 Aug 2025	Meeting	Reg 19 (policy development)	Section 106 Contributions & Health-Supportive Development	Roger Clotworthy; Matthew Diamond; George Marshall	Dave Tarbet; LPAE-Devon	Calendar entry and agenda
18 Aug 2025	Meeting	Reg 19 (coordination)	RDUH / NHS Devon catch-up on S106 and HUDU		Dave Tarbet; Malcolm Dicken	Calendar entry
02 Sep 2025	Email	Reg 19 policy development	LPAE-Devon follow up from T&FG meeting 7 Aug and confirming CIL compliant methodology for calculating support for NHS infrastructure	Roger Clotworthy	Malcolm Dicken	
04 Sep 2025	Email	Reg 19 policy development	Confirming process for evaluation	Roger Clotworthy	Malcolm Dicken Dave Tarbet	Email in which ECC confirm they will consider methodology

10 Oct 2025	Email	Reg 19 policy development	Trust chasing ECC T&FG chair for the conclusions of the committee noting LP deadline is approaching	Roger Clotworthy	Dave Tarbet	Trust suggesting T&FG has now ended
13 Oct 2025	Email	Reg 19	Draft Exeter Plan response circulated for comment		Malcolm Dicken; LPAE-Devon	Email requesting Malcolm's input
15 Oct	Email	Reg 19 Policy development	Response from T&FG chair to trust confirming working up a response Malcolm's evidence paper	Roger Clotworthy	Dave Tarbet	Responding to email 10.10
20 Oct 2025	Email	Reg 19 / Local plan response	Letter from Trust D.CEO to ECC explaining the impact of housing growth on acute services and expectation of new policy in the LP on the back of engagement with T&FG over summer 2025	Ian Collinson	Chris Tidman	Word Document
18 Dec 2025	Email	Reg 19	ECC position in response to D.CEO letter: support to secondary care via CIL only rather than S106	Roger Clotworthy	Dave Tarbet; Malcolm Dicken	ECC Exeter Plan letter. Noting no support for acute care on the draft LP

19 Dec 2025	Email	Reg 19	Agreement to pursue objections and hearings		Dave Tarbet; Malcolm Dicken	Follow-up correspondence
27 Jan 2026	Email	Reg 19	Letter to HM Inspector objecting to the Local Plan and asking to attend the hearing	Robert Young	Chris Tidman	Letter , email reply and invitation to hearings days for Matters 13 and 14
16 Apr 2026	Meeting	Reg 19 (Inspector)	Exeter Plan meeting	Ian Collinson; Roger Clotworthy	Dave Tarbet; Wilkes Solicitors	Calendar entry